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United States Department of Agriculture

Foreign Agricultural Service

Circular Series

SG 12-87
December 1987

USSR Grain Situation and Outlook

WINTER GRAIN OFF TO GOOD START

The 1987 Soviet grain crop estimate remains unchanged at 210 million tons including 80.5 million wheat, 114.5 million coarse grains and 15 million miscellaneous grains and pulses. The total grain area estimate remains at 116.0 million hectares.

Compared to last year, winter grains in the Soviet Union have gotten off to a better start with the pace of sowing close to average and adequate soil moisture levels in most areas. Although the total area sown to winter crops has not yet been reported, Soviet plans called for nearly the same area as last year's planned 39 million hectares. Based on sowing progress reports, it is estimated that actual crop area seeded fell somewhat below the target. Indications are that the area for winter grains will be close to last year's estimated seeded area of 32.5 million hectares.

November's precipitation was near to above-normal over most European USSR winter grain areas except for those in the southern Volga Vyatsk and the upper Volga where precipitation was much below normal. November temperatures averaged below normal over most of the eastern winter grain areas while temperatures in the west were above normal. While crops in the Baltic States, Belorussia, the Ukraine, and the North Caucasus entered dormancy after moderate hardening, winter grains over the remainder of the region remained dormant. On November 22-23, bitter cold Siberian air covered the Central Region, the Volga Vyatsk, and the upper Volga with minimum temperatures dropping to around -20 degrees C. While temperatures reached the winterkill threshold, the combination of snow cover and the short duration of the extreme cold minimized the potential for winterkill. Since early December, snow cover increased and advanced southward, covering winter grains as far south as the central Ukraine and the North Caucasus. Winter grains in the southern Ukraine and the central North Caucasus still lacked protective snow cover in early December. Usually, winter grains in these areas receive a sustained snow cover by January.

IMPORT ESTIMATE INCREASED

The pace of grain purchases by USSR grain buyers picked up this month. Much of the increase was attributed to U.S. wheat sales under the recent Export Enhancement Program (EEP) offer. In addition, EC grain sales to the USSR are now believed to total around 4 million tons with wheat accounting for close to two-thirds of the total. The recent sale of one million tons of milling wheat from German intervention stocks was the first such sale for 1987/88 with the

balance of sales reportedly feed wheat. The EC also recently sold more barley to the USSR. There have still been no reports of wheat sales to the USSR by either Argentina or Australia. So far during the 1987/88 marketing year, total USSR grain purchases are placed at close to 17 million tons.

Based on expectations that the USSR will purchase and ship all the wheat offered under the recent U.S. EEP before the end of the 1987/88 marketing year and that sales from other suppliers will hold near earlier projected levels, the estimate of 1987/88 USSR wheat imports has been increased to 20 million tons, up 3 million from the estimate carried in last month's USSR circular. (The estimate of USSR wheat imports for 1987/88 was increased to 18 million tons in the World Agricultural Supply and Demand Estimates report released on November 10, 1987). The heavy level of USSR wheat imports in 1987/88 is attributed in part to the reduced 1987 wheat crop as well as to a drop in the production of quality wheat when compared with a year earlier. The estimate of USSR imports of coarse grains continues at 10 million tons with miscellaneous grains and pulses accounting for the balance of the projected 31 million tons of total grain imports.

U.S. wheat sales to the USSR could be near record large in 1987/88 if the USSR buys all the wheat included in the recent offer under the EEP. Recently, the USSR was offered the opportunity to purchase 4.75 million tons of wheat under EEP. Purchases of this wheat in addition to the 3.3 million tons shipped earlier in the year would result in U.S. wheat sales of around 8 million tons for July-June 1987/88 shipment.

UTILIZATION ESTIMATE UNCHANGED

The estimate of USSR grain utilization for 1987/88 holds at 234 million tons, with grain for feed at 130 million tons the largest single item. The recent increase in imports has been accommodated by increasing the estimated stock change by 3 million to 6 million tons.

USSR EMERGES AS MAJOR BUYER OF U.S. SOYBEAN MEAL

Soviet imports of soybeans and soybean meal (in soybean meal equivalent) have increased steadily since 1984. The increase in these imports represents a crucial part of the current Soviet strategy of increasing animal productivity. Increasing animal productivity may also require a larger share of grain for feed in cattle rations. In recent buying activity, the USSR purchased 1.3 million tons of U.S. soybean meal and 800,000 tons of soybeans for delivery during the 1987/88 marketing year. These recent purchases for 1987/88 represent a dramatic increase in the U.S. share of that market. The Soviet have been sporadic buyers of the U.S. soybeans, however, their recent purchases of U.S. soybeans cover about 40 percent of the projected 1987/88 USSR soybean imports.

GRAIN PROCUREMENTS EXPECTED TO DECLINE

Despite another bumper grain crop this year, grain sales to the state in 1987 are expected to be below last year's level. Decreased procurements of grain in the RSFSR and Kazakhstan are expected to more than offset the 2.5-million-ton increase in the Ukrainian Republic as well as higher sales in other Republics.

The decline in procurements is partly the result of lower grain production and quality in those areas which generally sell a larger share of output to the state. In Kazakhstan, for example, grain quality and thus grain procurements were likely adversely affected by the rain hindered harvest in the northern grain areas in the Republic. Procurements of milling quality wheat this year are expected to be down to around the 1985 level, below the 30.4 million tons sold to the state in 1986.

THE PUBLICATION SCHEDULE FOR THE USSR GRAIN SITUATION AND OUTLOOK HAS BEEN MODIFIED TO COINCIDE MORE WITH THE PRINCIPAL GROWING AND HARVESTING PERIOD FOR GRAINS IN THE USSR. IN 1988, FAS WILL PUBLISH EIGHT ISSUES OF THE USSR CIRCULAR---IN FEBUARY AND MONTHLY DURING THE MAY-NOVEMBER PERIOD.*

Prepared by the USDA Inter-Agency Task Force on the USSR Grain Situation.

USSR Grain Area, Yield, and Production
1975-1986, and 1987 (Forecast)

Grain	Area (Million Hectares)	Yield (Metric Tons) (Per Hectare)	Production 1/ (Million) (Metric Tons)
Wheat			
1975	62.0	1.07	66.2
1976	59.5	1.63	96.9
1977	62.0	1.49	92.2
1978	62.9	1.92	120.9
1979	57.7	1.56	90.2
1980	61.5	1.60	98.2
1981	59.2	1.37	81.1
1982	57.3	1.47	84.3
1983	50.8	1.52	77.5
1984	51.1	1.34	68.6
1985	50.3	1.55	78.1
1986	48.7	1.89	92.3
1987 (Forecast)	46.0	1.75	80.5
Coarse Grains 2/			
1975	58.1	1.13	65.8
1976	60.9	1.89	115.0
1977	60.6	1.53	92.6
1978	58.0	1.82	105.4
1979	61.2	1.33	81.2
1980	57.9	1.39	80.5
1981	58.0	1.19	69.3
1982	58.0	1.58	91.8
1983	61.2	1.67	101.9
1984	59.2	1.53	90.5
1985	58.5	1.71	100.0
1986	58.6	1.81	105.9
1987 (Forecast)	60.3	1.90	114.5
Total Grain 3/			
1975	127.9	1.10	140.1
1976	127.8	1.75	223.8
1977	130.3	1.50	195.7
1978	128.5	1.85	237.4
1979	126.4	1.42	179.2
1980	126.6	1.49	189.1
1981	125.6	1.26	158.2
1982	123.0	1.52	186.8
1983	120.8	1.59	192.2
1984	119.6	1.44	172.6
1985	117.9	1.62	191.7
1986	116.5	1.80	210.1
1987 (Forecast)	116.0	1.81	210.0

1/ "Bunker weight" basis; not discounted for excess moisture or foreign material.
2/ Includes rye, barley, oats, corn, sorghum, and millet.
3/ Includes wheat, coarse grains, pulses, rice, buckwheat, and miscellaneous grains.

USSR: Total Grain, Wheat, and Coarse Grains: Supply/Utilization 1975/76-1987/88

Year	Production	Trade (Jul/Jun) Imports	Trade (Jul/Jun) Exports	Availability 1/ July/June	Total 1/	Seed	Industrial	Food	Dockage/ Waste 2/	Feed	Stock Change 3/ July/June
					(Million Metric Tons)						
					Total Grains 4/						
1975/76	140.1	26.1	0.7	166	178	25	5	45	14	89	-12
1976/77	223.8	11.0	3.3	232	220	26	5	45	31	113	+12
1977/78	195.7	18.9	2.3	212	229	26	5	45	29	124	-16
1978/79	237.4	15.6	2.8	250	230	25	6	46	28	125	+20
1979/80	179.2	31.0	0.8	209	223	26	6	46	22	123	-14
1980/81 5/	189.1	34.8	0.5	223	224	25	6	46	28	119	-1
1981/82 5/	158.2	47.3	0.5	205	211	25	5	47	16	118	-6
1982/83 5/	186.8	34.3	0.5	221	213	25	5	47	18	118	+8
1983/84 5/	192.2	32.5	0.5	224	218	26	5	47	21	120	+6
1984/85 5/	172.6	55.5	0.5	228	219	24	6	47	19	123	+9
1985/86 5/	191.7	29.9	0.5	221	218	24	5	47	18	124	+4
1986/87 5/	210.1	28.5	0.5	238	229	24	5	47	23	130	+9
Projected 1987/88	210.0	31.0	1.0	240	234	25	5	47	27	130	+6
					Wheat						
1975/76	66.2	10.1	0.5	76	86	13	1	35	7	30	-10
1976/77	96.9	4.6	1.0	100	92	13	2	35	14	28	+8
1977/78	92.2	6.6	1.0	98	109	14	2	35	14	44	-11
1978/79	120.9	5.1	1.5	124	107	13	2	35	14	43	+18
1979/80	90.2	12.0	0.5	102	114	13	2	35	11	53	-12
1980/81 5/	98.2	16.0	0.5	114	113	13	2	35	15	48	+1
1981/82 5/	81.1	20.3	0.5	101	104	11	2	36	8	47	-3
1982/83 5/	84.3	20.8	0.5	105	101	11	2	36	8	44	+4
1983/84 5/	77.5	20.5	0.5	98	93	11	2	36	9	35	+4
1984/85 5/	68.6	28.1	0.5	96	91	11	2	36	8	35	+5
1985/86 5/	78.1	15.7	0.5	93	92	11	1	36	8	36	+2
1986/87 5/	92.3	16.0	0.5	108	102	11	1	36	10	44	+6
Projected 1987/88	80.5	20.0	1.0	99	95	11	1	36	11	36	+4
					Coarse Grains						
1975/76	65.8	15.6	--	81	83	11	4	7	6	56	-2
1976/77	115.0	5.7	2.0	119	115	11	3	7	16	78	+4
1977/78	92.6	11.7	1.0	103	108	10	3	7	14	74	-5
1978/79	105.4	10.0	1.0	114	112	10	4	7	13	79	+2
1979/80	81.2	18.4	--	100	102	12	4	7	10	68	-2
1980/81 5/	80.5	18.0	--	98	101	12	4	7	12	66	-2
1981/82 5/	69.3	26.0	--	95	98	13	3	7	7	68	-3
1982/83 5/	91.8	12.5	--	104	101	13	3	7	9	69	+4
1983/84 5/	101.9	11.5	--	113	112	13	3	7	11	78	+2
1984/85 5/	90.5	26.9	--	117	114	12	4	7	10	81	+4
1985/86 5/	100.0	13.7	--	114	112	12	4	7	9	80	+2
1986/87 5/	105.9	12.0	--	118	115	12	4	7	11	81	+3
Projected 1987/88	114.5	10.0	--	125	123	13	4	7	14	85	+2

1/ Availability excludes beginning stocks. Totals may not add due to rounding.
2/ Includes post harvest losses incurred in transport and storage.
3/ Minus indicates withdrawal from stocks.
4/ Total grain production, trade, and utilization figures include pulses, paddy rice, buckwheat, and miscellaneous grains in addition to wheat and coarse grains.
5/ Preliminary for trade, availability, utilization, and stocks change.

USSR IMPORTS OF WHEAT AND COARSE GRAINS BY SOURCE 1974/75 - 1986/87
October/September Years
(Million Metric Tons)

	1974/75	1975/76	1976/77	1977/78	1978/79	1979/80	1980/81	1981/82	1982/83	1983/84	1984/85	1985/86	Prelim. 1986/87
Wheat													
U.S. 1/	2.2	3.0	3.0	3.5	3.8	2.3	3.8	6.1	3.0	7.6	2.9	.2	4.1
Canada	.9	2.8	1.2	2.5	1.2	3.9	3.5	5.5	7.5	7.7	4.8	4.6	4.9
Australia	.9	1.2	.4	.2	.6	2.8	2.1	2.1	1.0	2.0	1.8	3.2	1.3
Argentina	.7	1.1	.1	1.1	.1	2.0	3.3	2.7	4.4	3.4	4.1	.7	.6
EC	--	--	--	--	--	1.0	.8	1.6	4.0	3.9	4.9	5.3	6.2
Others	--	--	.4	1.0	.1	1.2	2.0	1.4	2.0	1.4	2.2	1.4	1.4
Total*	4.6	8.2	5.1	8.4	5.8	13.2	15.5	19.4	21.9	26.0	20.7	15.4	18.5
C. Grains													
U.S. 1/	1.0	11.9	3.1	11.1	11.5	6.0	5.7	7.8	3.2	6.5	15.8	6.8	4.1
Canada	.1	1.4	--	.2	.5	.9	3.2	3.9	1.6	.3	.7	1.3	1.5
Australia	.1	.8	--	--	--	1.4	.4	--	--	.1	1.1	--	--
Argentina	1.0	.3	.1	2.1	1.6	4.1	11.9	6.4	4.4	3.7	3.7	.5	1.4
EC	--	.8	--	.2	.2	.2	.7	.7	.5	--	2.7	1.5	1.5
Others	.9	2.2	--	.5	--	1.2	1.6	2.1	2.3	1.3	3.3	3.5	3.0
Total*	3.1	17.4	3.3	14.1	13.8	13.8	23.5	20.9	12.0	11.9	27.3	13.6	11.5
Total													
U.S. 1/	3.2	14.9	6.1	14.6	15.3	8.3	9.5	13.9	6.2	14.1	18.7	7.0	8.2
Canada	1.1	4.2	1.2	2.7	1.7	4.8	6.7	9.4	9.1	8.0	5.5	5.9	6.4
Australia	1.0	2.1	.4	.2	.6	4.2	2.4	2.1	1.0	2.1	2.9	3.2	1.3
Argentina	1.7	1.4	.2	3.2	1.6	6.2	15.2	9.1	8.8	7.1	7.8	1.2	2.0
EC	--	.8	--	.2	.2	1.2	1.5	2.3	4.5	3.9	7.6	6.8	7.7
Others	.7	2.2	.5	1.6	.2	2.3	3.7	3.5	4.3	2.7	5.5	4.9	4.4
Total*	7.7	25.6	8.4	22.5	19.6	27.0	39.0	40.3	33.9	37.9	48.0	29.0	30.0

-- Denotes less than 50,000 tons.
* Totals may not add due to rounding. Excludes rice and pulses.
1/ U.S. exports based upon Export Sales data, which normally include transshipments whereas Census data may not.

SOURCE: Based on reports of countries exporting to the USSR.

*U.S. GOVERNMENT PRINTING OFFICE:1987-201-020:60341/FAS

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USSR Grain Situation and Outlook

Circular Series

SG-11-87
November 1987

1987 CROP ESTIMATE UNCHANGED

The 1987 Soviet grain crop estimate remains unchanged at 210 million tons including 80.5 million wheat, 114.5 million coarse grains and 15 million miscellaneous grains and pulses. The total grain area estimate remains at 116.0 million hectares.

In a speech on November 2, General Secretary Gorbachev stated that this year's harvest would be above 210 million tons. This statement is in agreement with previous statements by other high ranking Soviet officials.

Dry weather during October permitted harvesting and threshing operations of small grains to approach the average of recent years. Harvesting of corn-for-grain picked up substantially in October although the harvested area as of October 26 was only slightly over 3 million hectares.

The sowing of winter crops has progressed on schedule with 37 million hectares sown as of October 26. In general, growing conditions have been better than last year with current prospects pointing to an above-average winter grain crop.

RECENT WEATHER AND CROP DEVELOPMENTS

In the European USSR, corn harvesting progressed during October and winter grain planting advanced toward completion. Most crop areas received below-normal October precipitation, with dry weather covering the Volga Vyatsk Region, the Volga, the Black Soils Region, and the northeastern Ukraine. Infrequent but significant rain over crop areas in Moldavia and the extreme eastern North Caucasus produced above-normal precipitation, causing only brief delays in corn harvesting. Below-normal October precipitation over the Ukraine and the western North Caucasus helped corn harvesting, but limited moisture conditions for winter grain establishment in parts of the southeastern Ukraine. Following a mild weather pattern in early October, unseasonably cold weather began over northern crop areas on October 18, and spread as far south as the North Caucasus on October 25. Daily temperatures decreased rapidly in eastern Belorussia, the Central Region, the Black Soils Region, the Volga Vyatsk, and the Volga, causing winter grains to enter dormancy. Winter wheat in major producing areas of the Ukraine and North Caucasus began cold hardening about 1-2 weeks earlier than usual.

In spring grain areas east of the Ural mountains, unseasonable warm, dry weather during October 8 - 23 reversed September's wet weather pattern over the Urals, Kazakhstan, and most of Western Siberia, allowing the spring grain harvest to progress toward completion with few delays.

Approved by the World Agricultural Outlook Board – USDA

Since early November, unseasonable cold weather continued over the European USSR. Significant amounts of rain (13-50mm) increased moisture supplies over the central North Caucasus and the Crimea.

IMPORT ESTIMATE UNCHANGED

The estimate of USSR grain imports for the 1987/88 marketing year continues at 28 million tons, including 17 million wheat, 10 million coarse grains, and the balance rice, pulses and miscellaneous grains. Corn and barley imports will again account for the bulk of the USSR coarse grain imports.

USSR grain buying activity appeared to have slowed this past month. Soviet grain buyers purchased over 1.5 million tons of U.S. corn for nearby delivery. They also continued to show interest in milling quality wheats from a number of countries. It is likely that given the harvesting difficulties over the spring wheat producing areas of the USSR that imports of milling quality wheat will be up in 1987/88. In contrast, the near record coarse grain crop and significant quantities of off-grade wheat in some areas would seem to imply that feed wheat imports would fall well short of last year's estimated 5 to 6 million tons. The EC has already sold the USSR small quantities of feed wheat. However, sales by Canada, last year's major shipper of feed quality wheat, have to date been predominately high quality spring and durum wheat. Purchases to date are believed to have covered about half of the USSR's projected 1987/88 wheat import needs. Recent purchases of U.S. corn along with earlier barley transactions from other origins have brought USSR coarse grain purchases up to about a third of anticipated total coarse grain imports.

The estimate of USSR grain utilization and stock change is also unchanged from a month ago.

PROCUREMENTS OF QUALITY WHEAT EXPECTED DOWN

Despite a 1987 crop reportedly not much different from the 1986 harvest, total grain procurements from the 1987 crop are expected to be less than last year, specifically in the RSFSR and Kazakhstan. Since those areas which generally sell a greater share of their output to the state (e.g. the New Lands) are also the same areas with below year-earlier production, procurements may decline.

Procurement of quality wheat in 1987 is expected to be down from last year when sales to the state topped 30 million tons. Large sales of quality wheat (silnaya and tsennaya) reported in numerous areas, including the Ukraine, Altai Krai, Krasnodar Krai, and Moldavia, will not likely offset lower production of quality spring wheat in northern Kazakhstan and the Urals region in the Russian Republic.

FERTILIZER PRODUCTION CONTINUES TO OUTPACE 1986

Soviet production of mineral fertilizers for the January-September 1987 period reportedly totaled 27.1 million tons, 5 percent above the same period a year earlier. Production of plant protectant agents at 251,000 tons for January-September 1987, was about the same as last year and basically in line with plan.

INTENSIVE TECHNOLOGY AREA TO BE INCREASED IN 1988

The Soviets plan to increase grain area under intensive technology (IT) to about 39 million hectares for the 1988 crop. In June 1987, it was reported that IT was being practiced on about 35 million hectares of grain, a million hectares less than originally called for. In 1986, IT covered about 27 million hectares of grain, approximately 11.5 million more than in 1985.

FORAGE CROP RECORD, BUT QUALITY OFF

Supplies of major roughage crops for overwintering this year are record large. Records have been set in production of hay, haylage, and silage, while production of artifically dehydrated grass meal and supplies of straw for feed are lower than last year. For most roughage feeds, though, quality is expected to be off this year, due in large part to rain during harvesting.

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1975	127.9	1.10	140.1
1976	127.8	1.75	223.8
1977	130.3	1.50	195.7
1978	128.5	1.85	237.4
1979	126.4	1.42	179.2
1980	126.6	1.49	189.1
1981	125.6	1.26	158.2
1982	123.0	1.52	186.8
1983	120.8	1.59	192.2
1984	119.6	1.44	172.6
1985	117.9	1.62	191.7
1986	116.5	1.80	210.1
1987 (Forecast)	116.0	1.81	210.0

1/ "Bunker weight" basis; not discounted for excess moisture or foreign material.
2/ Includes rye, barley, oats, corn, sorghum, and millet.
3/ Includes wheat, coarse grains, pulses, rice, buckwheat, and miscellaneous grains.

USSR: Total Grain, Wheat, and Coarse Grains: Supply/Utilization 1975/76-1987/88

Year	Production	Trade (Jul/Jun) Imports	Trade (Jul/Jun) Exports	Availability 1/ July/June	Total 1/	Seed	Industrial	Food	Dockage/ Waste 2/	Feed	Stock Change 3/ July/June
					(Million Metric Tons)						
					Total Grains 4/						
1975/76	140.1	26.1	0.7	166	178	25	5	45	14	89	-12
1976/77	223.8	11.0	3.3	232	220	26	5	45	31	113	+12
1977/78	195.7	18.9	2.3	212	229	26	5	45	29	124	-16
1978/79	237.4	15.6	2.8	250	230	25	6	46	28	125	+20
1979/80	179.2	31.0	0.8	209	223	26	6	46	22	123	-14
1980/81 5/	189.1	34.8	0.5	223	224	25	6	46	28	119	-1
1981/82 5/	158.2	47.3	0.5	205	211	25	5	47	16	118	-6
1982/83 5/	186.8	34.3	0.5	221	213	25	5	47	18	118	+8
1983/84 5/	192.2	32.5	0.5	224	218	26	5	47	21	120	+6
1984/85 5/	172.6	55.5	0.5	228	219	24	6	47	19	123	+9
1985/86 5/	191.7	29.9	0.5	221	218	24	5	47	18	124	+4
1986/87 5/	210.1	28.8	0.5	238	229	24	5	47	23	130	+9
Projected 1987/88	210.0	28.0	1.0	237	234	25	5	47	27	130	+3
					Wheat						
1975/76	66.2	10.1	0.5	76	86	13	1	35	7	30	-10
1976/77	96.9	4.6	1.0	100	92	13	2	35	14	28	+8
1977/78	92.2	6.6	1.0	98	109	14	2	35	14	44	-11
1978/79	120.9	5.1	1.5	124	107	13	2	35	14	43	+18
1979/80	90.2	12.0	0.5	102	114	13	2	35	11	53	-12
1980/81 5/	98.2	16.0	0.5	114	113	13	2	35	15	48	+1
1981/82 5/	81.1	20.3	0.5	101	104	11	2	36	8	47	-3
1982/83 5/	84.3	20.8	0.5	105	101	11	2	36	8	44	+4
1983/84 5/	77.5	20.5	0.5	98	93	11	2	36	9	35	+4
1984/85 5/	68.6	28.1	0.5	96	91	11	2	36	8	35	+5
1985/86 5/	78.1	15.7	0.5	93	92	11	1	36	8	36	+2
1986/87 5/	92.3	16.0	0.5	108	102	11	1	36	10	44	+6
Projected 1987/88	80.5	17.0	1.0	96	94	11	1	36	11	35	+2
					Coarse Grains						
1975/76	65.8	15.6	--	81	83	11	4	7	6	56	-2
1976/77	115.0	5.7	2.0	119	115	11	3	7	16	78	+4
1977/78	92.6	11.7	1.0	103	108	10	3	7	14	74	-5
1978/79	105.4	10.0	1.0	114	112	10	4	7	13	79	+2
1979/80	81.2	18.4	--	100	102	12	4	7	10	68	-2
1980/81 5/	80.5	18.0	--	98	101	12	4	7	12	66	-2
1981/82 5/	69.3	26.0	--	95	98	13	3	7	7	68	-3
1982/83 5/	91.8	12.5	--	104	101	13	3	7	9	69	+4
1983/84 5/	101.9	11.5	--	113	112	13	3	7	11	78	+2
1984/85 5/	90.5	26.9	--	117	114	12	4	7	10	81	+4
1985/86 5/	100.0	13.7	--	114	112	12	4	7	9	80	+2
1986/87 5/	105.9	12.3	--	118	115	12	4	7	11	81	+3
Projected 1987/88	114.5	10.0	--	125	124	13	4	7	14	86	1

1/ Availability excludes beginning stocks. Totals may not add due to rounding.
2/ Includes post harvest losses incurred in transport and storage.
3/ Minus indicates withdrawal from stocks.
4/ Total grain production, trade, and utilization figures include pulses, paddy rice, buckwheat, and miscellaneous grains in addition to wheat and coarse grains.
5/ Preliminary for trade, availability, utilization, and stocks change.

USSR Total Grain Imports 1/
By Country of Origin by months
In 1,000 Metric Tons

	U.S.	Canada	Australia	EC	Argentina	Sub Total	Total 2/
July 1984	259	1,481	58	59	286	2,143	
August	1,231	1,408	115	444	330	3,528	
September	2,172	1,254	132	943	293	4,794	
July-Sept	3,662	4,143	305	1,446	909	10,465	11,300
October	2,320	809	152	966	302	4,549	
November	3,014	961	244	840	99	5,158	
December	3,535	96	100	512	230	4,473	
Oct-Dec	8,869	1,866	496	2,318	631	14,180	14,800
January 1985	2,218	98	154	599	1,082	4,151	
February	2,196	---	215	572	1,248	4,231	
March	2,023	17	667	934	926	4,567	
Jan-March	6,437	115	1,036	2,105	3,256	12,949	14,000
April	2,016	388	716	930	1,225	5,275	
May	1,566	1,237	468	921	1,368	5,560	
June	106	481	211	1,116	580	2,494	
April-June	3,688	2,106	1,395	2,967	3,173	13,329	14,700
July	8	---	25	208	443	684	
August	---	---	---	152	281	433	
September	---	1,384	---	75	59	1,518	
July-Sept	8	1,384	25	435	783	2,635	3,600
October	411	1,057	89	200	316	2,073	
November	2,487	900	212	485	423	4,507	
December	1,337	750	101	1,155	57	3,400	
Oct-Dec	4,235	2,707	402	1,840	796	9,980	11,400
January 1986	980	171	450	1,160	15	2,776	
February	956	---	494	1,080	---	2,530	
March	71	---	850	852	---	1,773	
Jan-March	2,007	171	1,794	3,092	15	7,079	7,900
April	---	---	373	487	---	860	
May	172	435	575	445	220	1,847	
June	547	646	34	582	172	1,981	
April-June	719	1,081	982	1,514	392	4,688	6,400
July	---	604	---	51	---	655	
August	---	501	---	---	---	501	
September	---	666	14	1	---	681	
July-September	---	1,771	14	52	---	1,837	2,600
October	---	1,027	211	314	---	1,552	
November	--	1,264	300	640	---	2,204	
December	---	1,198	129	740	---	2,067	
October-December	---	3,489	640	1,694	---	5,823	6,900
January 1987	---	383	153	642	75	1,253	
February	---	207	101	1,140	330	1,778	
March	316	497	134	1,165	303	2,415	
Jan-March	316	1,087	388	2,947	708	5,446	6,400
April	1,753	1,018	129	1,452 3/	765	5,117	
May	1,840	777	123	1,050 3/	412	4,202	
June	193	11	13	150 3/	40	407	
April-June	3,786	1,806	265	2,652 3/	1,217	9,726	12,400
July	1,915	---	---	100 3/	10	2,025	
August	1,064	---	---	100 3/	---	1,164	
September	316	74	---	100 3/	---	490	
July-September	3,295	74	---	300 3/	10	3,679	4,300

1/ Based on reported exports for countries enumerated and estimates for other countries to the USSR; excludes rice, buckwheat, millet, and other miscellaneous grains and pulses. Includes grain equivalent of flour.
2/ Partially estimated including tentative estimates for countries not enumerated, or for countries from which data is not available.
3/ Preliminary
N/A Not Available

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October 1987

USSR Grain Situation and Outlook

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RECENT WEATHER AND CROP DEVELOPMENTS

In the European USSR, winter grain planting advanced southward during September. Corn harvesting began in southern areas about 2 weeks later than usual. Above-normal September precipitation covered the Baltic States, Belorussia, the northern Ukraine, the Central Region, the Black Soils Region, the northern North Caucasus, the Volga, and the Volga Vyatsk, providing abundant soil moisture for winter grain emergence. However, September temperatures in these areas were below-normal, slowing winter grain growth. Further south, September precipitation was below normal over the southern half of the Ukraine and the central North Caucasus, allowing winter grain planting to progress without delay. Corn harvesting was delayed because of late plantings and unseasonably cool weather during much of the growing season. On September 22, scattered light frost covered the Baltic States, Belorussia, the western Ukraine, and the eastern Ukraine, about 2 weeks earlier than usual.

In spring grain areas east of the Ural mountains, September weather was the wettest in at least the past 37 years. Persistent showers in September produced much above-normal precipitation over most areas, resulting in significant harvest delays. Two to five times the normal amount of rain fell over crop areas in the Urals, Western Siberia, and northern Kazakhstan, where harvest delays were likely the greatest.

Since early October, drier weather accompanied a slow warming trend in the European USSR, helping winter grain planting and corn harvesting. Rain is needed in the southern Ukraine for uniform winter grain emergence and early plant establishment. Light showers in the Urals, Western Siberia, and northern Kazakhstan, continued to delay spring grain harvesting.

1987 CROP ESTIMATE INCREASED

The 1987 Soviet grain crop estimate was revised upward by 5 million tons to 210 million based on reported preliminary harvest yields and anticipated increased bunker weights due to the prolonged wet harvest conditions. Production estimates increased as follows: wheat, 2.0 million tons; barley, 2.0; and rye, 1.0. Estimated total area remains unchanged at 116 million hectares.

Soviet press reports on grain yields indicate a 1987 grain crop in the European USSR above that of last year. Reports from the New Lands, however, are more sparse and less optimistic, where yields are expected to be less than last

Approved by the World Agricultural Outlook Board – USDA

year. Although the size of this year's total grain crop is expected to match last year's, there are important factors remaining that could affect the final outcome:

1) Difficult harvest conditions in northern Kazakhstan, West Siberia, Urals, and Volga-Vyatka due to the persistent rains in September.

2) Possibility of snow in these areas which would bring a halt to the harvest.

As of September 28, 1987, the Soviets reported grains and pulses had been cut on 100.1 million hectares (MHA) and threshed on 95.7 MHA, 5 MHA and 7.3 MHA less than last year on this same date, respectively. The number of hectares of corn-for-grain harvested is 849,000 compared to 2.5 million last year on the same date. However, in 1980, when the corn-for-grain harvest lagged even further behind than this year's harvest pace, corn yields were slightly above average. Despite adverse weather in many areas, seeding of winter crops was reportedly on schedule with 28.5 MHA sown as of September 21.

USSR GRAIN PURCHASES PICK-UP

USSR grain buyers had been relatively inactive in the world grain market since they purchased the 4 million tons of U.S. wheat in May under the Export Enhancement Program. However, in recent weeks, reports have been received of Canadian wheat sales of around 3 million tons and EC wheat and barley sales in the area of 1.5 million. Total purchases from all origins are now believed to be close to 10 million tons. This would still lag the level of USSR grain purchases as of this date in recent years.

The Canadian sales were reportedly high quality milling wheat and durum with no feed wheat included in the deal. Late season harvesting difficulties, combined with a smaller 1987 wheat crop are expected to result in larger Soviet imports of high quality wheat. It would appear that an adverse growing season over the principal USSR durum area has prompted the Soviets to enter the world's durum market early as evidenced by their recent purchase of up to a million tons of Canadian durum.

Recent EC wheat sales, first of the 1987/88 marketing year, are reported to be predominantly feed quality wheat. Much of this wheat is expected to come from France, where a wet harvesting period adversely affected crop quality.

IMPORT DEMAND EXPECTED TO BE DOWN

Total grain imports in 1987/88 are currently projected at 28 million tons, including 17 million tons of wheat, 10 million coarse grains, with the balance rice, pulses and miscellaneous grains. Coarse grain imports of only 10 million tons would represent the third straight year of declining trade as 3 consecutive large crops have permitted the Soviets to reduce dependence on outside coarse grain supplies. In addition, the past 2 years have witnessed increases in USSR purchases of feed wheat at the expense of coarse grain, particularly U.S. corn. Feed quality wheat supplies, particularly in the EC, are large again this year, however, the Soviets with a large coarse grain crop and sizable supplies of lower quality wheat may reduce feed wheat imports in 1987/88.

The estimate of 1987/88 USSR wheat imports is surrounded with more than usual uncertainty. The 1987 USSR wheat harvest is projected at 80.5 million tons, 13 percent below last year's harvest. In addition, harvesting difficulties have likely had an adverse effect on the quality of the 1987 crop, particularly in the New Lands, where much of the USSR's high quality spring wheat is produced. This could push up USSR import requirements for higher quality wheat.

GRAIN DEMAND EXPECTED TO CONTINUE STRONG

Grain utilization in 1987/88 is projected to total over 230 million tons. Grain for feed requirements at 130 million tons are expected to continue heavy as the USSR strives to meet the expanding demand for livestock products. Reflecting the continued harvesting difficulties, the allowance for dockage and waste in the 1987 crop has been increased to its highest level in recent years. Little is known about USSR grain stock levels or policies. However, based on analysis of the USSR grain situation, the Soviets are estimated to have added around 35 million tons to their grain stocks in recent years. These additional stocks could draw on if a larger than usual portion of the 1987 crop is not fit for human consumption.

PRODUCTION OF FERTILIZER UP

Soviet production of fertilizers for January-August 1987 reportedly increased by 5 percent over the same period last year to 24.1 million tons, slightly more than planned. Production of plant protectant agents (PPA's) remained at about the same level as 1986 for the 8-month period (227,000 tons), slightly more than set by the plan. Soviet plans call for increased imports of quality PPA's from the West rather than expanded domestic production.

FEED SUPPLIES LARGE, BUT QUALITY DOWN

Production of roughage crops has continued to run close to last year's record pace. Production of hay and haylage this year has reached record amounts, but production of artificially dehydrated grass meal is off and production of silage, which is now in full swing, continues to lag behind recent years. The lag in silage production is understandable given this year's late spring and cooler than normal summer. Though silage production may draw even with that of recent years by the end of the harvest season (about the end of October), the quality is expected to be down due to less than normal maturity.

Quality of hay and haylage should also be lower this year. Therefore, despite quantities of feed which may still exceed 1986's record, the feed value of the 1987 roughage crop is likely to be below last year's.

LIVESTOCK INVENTORIES LOWER

Livestock inventories continued to run below year earlier levels as of September 1. Only poultry numbers were higher. Soviet livestock growth strategy appears to be centered on increasing per head productivity with very limited expansion of inventories. This "intensification" strategy was followed successfully in 1986, particularly for beef and milk production. The severe winter and late spring has forced the Soviets to make reduction in hog inventories which may result in declines in pork production this fall and into 1988.

Prepared by the USDA Inter-Agency Task Force on the USSR Grain Situation.

USSR Grain Area, Yield, and Production
1975-1986, and 1987 (Forecast)

Grain	Area (Million Hectares)	Yield (Metric Tons) (Per Hectare)	Production 1/ (Million) (Metric Tons)
Wheat			
1975	62.0	1.07	66.2
1976	59.5	1.63	96.9
1977	62.0	1.49	92.2
1978	62.9	1.92	120.9
1979	57.7	1.56	90.2
1980	61.5	1.60	98.2
1981	59.2	1.37	81.1
1982	57.3	1.47	84.3
1983	50.8	1.52	77.5
1984	51.1	1.34	68.6
1985	50.3	1.55	78.1
1986	48.7	1.89	92.3
1987 (Forecast)	46.0	1.75	80.5
Coarse Grains 2/			
1975	58.1	1.13	65.8
1976	60.9	1.89	115.0
1977	60.6	1.53	92.6
1978	58.0	1.82	105.4
1979	61.2	1.33	81.2
1980	57.9	1.39	80.5
1981	58.0	1.19	69.3
1982	58.0	1.58	91.8
1983	61.2	1.67	101.9
1984	59.2	1.53	90.5
1985	58.5	1.71	100.0
1986	58.6	1.81	105.9
1987 (Forecast)	60.3	1.90	114.5
Total Grain 3/			
1975	127.9	1.10	140.1
1976	127.8	1.75	223.8
1977	130.3	1.50	195.7
1978	128.5	1.85	237.4
1979	126.4	1.42	179.2
1980	126.6	1.49	189.1
1981	125.6	1.26	158.2
1982	123.0	1.52	186.8
1983	120.8	1.59	192.2
1984	119.6	1.44	172.6
1985	117.9	1.62	191.7
1986	116.5	1.80	210.1
1987 (Forecast)	116.0	1.81	210.0

1/ "Bunker weight" basis; not discounted for excess moisture or foreign material.
2/ Includes rye, barley, oats, corn, sorghum, and millet.
3/ Includes wheat, coarse grains, pulses, rice, buckwheat, and miscellaneous grains.

USSR: Total Grain, Wheat, and Coarse Grains: Supply/Utilization 1975/76-1987/88

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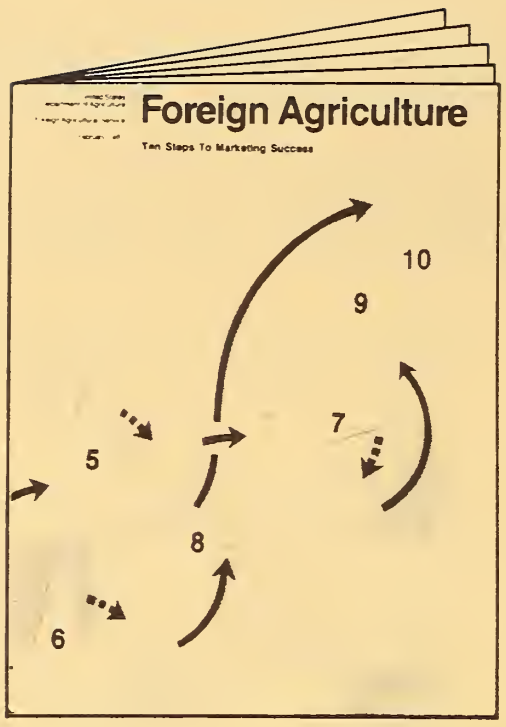
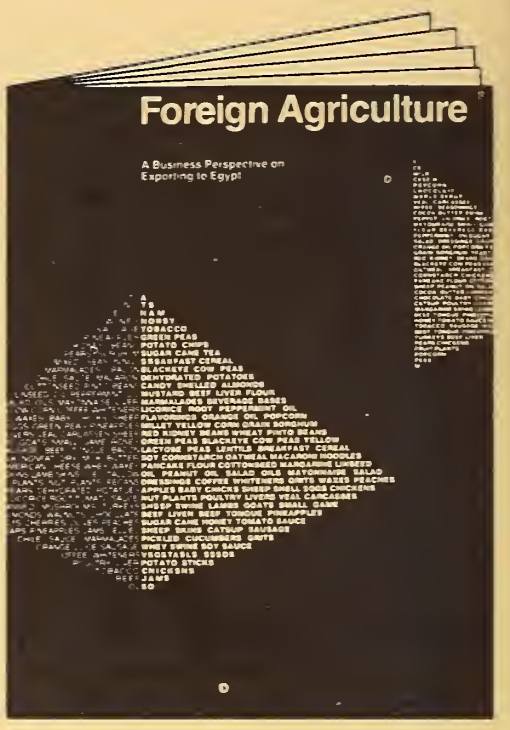
1978/79	237.4	15.6	2.8	250	230	25	6	46	28	125	+20
1979/80	179.2	31.0	0.8	209	223	26	6	46	22	123	-14
1980/81 5/	189.1	34.8	0.5	223	224	25	6	46	28	119	-1
1981/82 5/	158.2	47.3	0.5	205	211	25	5	47	16	118	-6
1982/83 5/	186.8	34.3	0.5	221	213	25	5	47	18	118	+8
1983/84 5/	192.2	32.5	0.5	224	218	26	5	47	21	120	+6
1984/85 5/	172.6	55.5	0.5	228	219	24	6	47	19	123	+9
1985/86 5/	191.7	29.9	0.5	221	218	24	5	47	18	124	+4
1986/87 5/	210.1	28.8	0.5	238	229	24	5	47	23	130	+9
Projected 1987/88	210.0	28.0	1.0	237	234	25	5	47	27	130	+3
					Wheat						
1975/76	66.2	10.1	0.5	76	86	13	1	35	7	30	-10
1976/77	96.9	4.6	1.0	100	92	13	2	35	14	28	+8
1977/78	92.2	6.6	1.0	98	109	14	2	35	14	44	-11
1978/79	120.9	5.1	1.5	124	107	13	2	35	14	43	+18
1979/80	90.2	12.0	0.5	102	114	13	2	35	11	53	-12
1980/81 5/	98.2	16.0	0.5	114	113	13	2	35	15	48	+1
1981/82 5/	81.1	20.3	0.5	101	104	11	2	36	8	47	-3
1982/83 5/	84.3	20.8	0.5	105	101	11	2	36	8	44	+4
1983/84 5/	77.5	20.5	0.5	98	93	11	2	36	9	35	+4
1984/85 5/	68.6	28.1	0.5	96	91	11	2	36	8	35	+5
1985/86 5/	78.1	15.7	0.5	93	92	11	1	36	8	36	+2
1986/87 5/	92.3	16.0	0.5	108	102	11	1	36	10	44	+6
Projected 1987/88	80.5	17.0	1.0	96	94	11	1	36	11	35	+2
					Coarse Grains						
1975/76	65.8	15.6	--	81	83	11	4	7	6	56	-2
1976/77	115.0	5.7	2.0	119	115	11	3	7	16	78	+4
1977/78	92.6	11.7	1.0	103	108	10	3	7	14	74	-5
1978/79	105.4	10.0	1.0	114	112	10	4	7	13	79	+2
1979/80	81.2	18.4	--	100	102	12	4	7	10	68	-2
1980/81 5/	80.5	18.0	--	98	101	12	4	7	12	66	-2
1981/82 5/	69.3	26.0	--	95	98	13	3	7	7	68	-3
1982/83 5/	91.8	12.5	--	104	101	13	3	7	9	69	+4
1983/84 5/	101.9	11.5	--	113	112	13	3	7	11	78	+2
1984/85 5/	90.5	26.9	--	117	114	12	4	7	10	81	+4
1985/86 5/	100.0	13.7	--	114	112	12	4	7	9	80	+2
1986/87 5/	105.9	12.3	--	118	115	12	4	7	11	81	+3
Projected 1987/88	114.5	10.0	--	125	124	13	4	7	14	86	1

1/ Availability excludes beginning stocks. Totals may not add due to rounding.
2/ Includes post harvest losses incurred in transport and storage.
3/ Minus indicates withdrawal from stocks.
4/ Total grain production, trade, and utilization figures include pulses, paddy rice, buckwheat, and miscellaneous grains in addition to wheat and coarse grains.
5/ Preliminary for trade, availability, utilization, and stocks change.





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USSR Grain Situation and Outlook

Circular Series

SG-9-87
September 1987

Highlights of this month's review of the 1987/88 USSR grain situation are:

-- Despite harvesting delays, conditions continue to point to a large 1987 grain harvest of 205 million tons.

-- The grain import estimate for 1987/88 is further reduced as USSR grain buying activity continues to run well short of expectations.

-- Prospects for a large forage crop along with continued slow growth in the livestock sector may limit the growth in grain demand in 1987/88.

1987 CROP ESTIMATE UNCHANGED

The 1987 Soviet grain crop estimate continues at 205 million tons, including 78.5 million wheat, 111.5 million coarse grains, and 15 million miscellaneous grains and pulses. The total grain area estimate remains at 116.0 million hectares. All estimates of area, yield, and production remain unchanged from last month.

Soviet harvest reports received since last month's estimate indicate a crop larger than last year west of the Volga. Only scant data have been received from the New Lands, although preliminary information suggest yields will be down somewhat from last year. Last year was an excellent year in the New Lands with Kazakhstan producing over 28 million tons, the best since the record crop of 34.5 million tons in 1979.

As of September 7, 1987, the Soviets reported grains and pulses had been cut on 86.8 million hectares, 3.8 million below last year. The area in windrows at 9.2 million hectares is identical to last year.

RECENT WEATHER AND CROP DEVELOPMENTS

In the European USSR, crop harvesting continued during August and planting of 1988 winter grain crops began in northern areas. Frequent showers during the first half of August produced above-normal precipitation over the Baltic States, eastern Belorussia, the western portion of the Central Region, the western half of the Ukraine, the Volga Vyatsk, and the Volga, causing some delays in harvesting and winter grain planting. However, dry weather over these areas from August 17 through August 27 improved harvest conditions. Below-normal August precipitation over eastern areas of the Central Region, the Black Soils Region, the eastern Ukraine, and the western North Caucasus allowed harvesting to progress with minimal delays. Unseasonably cool August weather covered most crop areas. Monthly average temperatures were 2 to 4 degrees C

Approved by the World Agricultural Outlook Board – USDA

below normal in the Ukraine, delaying corn development. By month's end, corn was maturing in the extreme south and was in the early grain-filling stage in the central and eastern Ukraine.

In spring grain areas east of the Ural mountains, unseasonably warm, dry weather covered most areas during August. Crop areas which received above-normal precipitation were spotty, including areas around Kustanay and extreme eastern areas. From August 1 through August 20, above normal temperatures and generally dry weather helped early spring grain harvesting in Kazakhstan and hastened crop maturity in Western Siberia. From August 21 through the end of the month, a cooling trend and frequent showers over most areas slowed harvesting.

Since early September, unseasonably cool weather continued over European USSR. Several days of dry weather benefited fieldwork in most areas of the Soviet Union, except for areas which extended eastward from the Central Region through the northern Urals, where frequent showers caused some delays.

IMPORT ESTIMATE REDUCED

As of early September, USSR grain purchases for delivery during 1987/88 from all origins are estimated at only around 5 million tons. Some earlier reports of sales activity have yet to be followed by actual shipments, raising some questions as to whether sales have actually taken place.

The slow pace of early-season grain purchases along with continued favorable prospects for the 1987 grain crop has prompted a further reduction in the estimate of 1987/88 USSR grain imports. Imports are currently estimated at 28 million tons, 3 million below the month earlier estimate and the smallest since 1978/79 when the Soviet Union harvested a record crop. Wheat imports are estimated at 17 million tons, still fractionally above the 1986/87 level. A number of uncertainties surround the estimate of 1987/88 wheat imports, including the likely level of USSR feed wheat imports given their large 1987 coarse grain crop as well as their requirements for imported high quality wheat given the adverse harvesting weather over major parts of the European USSR and the prospects of a smaller crop in the quality wheat producing areas of the New Lands. The level of USSR feed wheat imports will also depend on how competitive feed wheat prices are relative to prices of Canadian and EC barley and U.S. and Argentine corn. USSR feed wheat imports in 1986/87 are estimated to have totaled around 4 million tons. It would seen unlikely, given this year's large coarse grain harvest, that feed wheat imports would be as heavy in 1987/88.

Coarse grain imports in 1987/88 are projected to total only 10 million tons, the smallest since 1978/79. Given the large 1987 coarse grain crop, total USSR coarse grain supplies are likely to be the largest ever. The bulk of the USSR coarse grain trade in 1987/88 should be covered by various agreements as the major suppliers, the United States, Canada and Argentina, all have agreements with the USSR covering grain trade. USSR imports of corn and barley could fall to the lowest level in a number of years with much depending on USSR decisions on feed wheat imports versus coarse grains.

1986/87 IMPORT ESTIMATE LOWERED

The estimate of total grain imports for 1986/87 has been reduced to 28.8 million tons, as late season shipping data point to smaller USSR grain liftings than expected. Wheat imports are now estimated at 16 million tons, coarse grains at 12.3 million, and miscellaneous grains, rice and pulses at 500,000 tons.

Preliminary 1986/87 data indicates that for the first time, Canada was the largest single grain supplier to the USSR with shipments totaling over 8 million tons. The EC was a close second and the two accounted for nearly 60 percent of the wheat and coarse grains moving to the USSR. U.S. sales at only 4.9 million tons were the smallest since 1974/75 and accounted for only 17 percent of the total.

DOMESTIC USE UNCHANGED

The estimate of USSR grain utilization for 1987/88 is unchanged from a month ago. Prospects for another large forage crop along with a slowdown in growth in the livestock sector is expected to hold 1987/88 grain for feed requirements at the year earlier level of 130 million tons. Reflecting early harvesting difficulties, the estimate of dockage and waste has been set at 12 percent of the crop or 24 million tons, slightly above the historic average. The reduction in the 1987/88 import estimate has been reflected in a smaller build-up in USSR grain stocks in 1987/88 than earlier estimated.

ROUGHAGE CROP PROGRESS SLOW

Production of roughage feeds this year is running at a pace comparable with last year's record crop. As of September 7, production of hay was 4 percent higher and haylage 19 percent higher than at the same time last year. Silage production to date is less than last year, reflecting slower crop development this season. Supplies of grass meal and straw for feed are also lower than last year. The quality of roughage feeds this year could be down due to excessive moisture.

LIVESTOCK SECTOR CONTINUES TO SHOW IMPACT OF UNFAVORABLE WEATHER

As of 1 August, all animal numbers except for poultry had decreased compared to the same time last year. Most affected were hog inventories, down 3 percent. The continued contraction of overall livestock inventories is likely a result of the lingering effects of the past harsh winter and the late spring.

Prepared by the USDA Inter-Agency Task Force on the USSR Grain Situation.

USSR Grain Area, Yield, and Production
1975-1986, and 1987 (Forecast)

Grain	Area (Million Hectares)	Yield (Metric Tons) (Per Hectare)	Production 1/ (Million) (Metric Tons)
Wheat			
1975	62.0	1.07	66.2
1976	59.5	1.63	96.9
1977	62.0	1.49	92.2
1978	62.9	1.92	120.9
1979	57.7	1.56	90.2
1980	61.5	1.60	98.2
1981	59.2	1.37	81.1
1982	57.3	1.47	84.3
1983	50.8	1.52	77.5
1984	51.1	1.34	68.6
1985	50.3	1.55	78.1
1986	48.7	1.89	92.3
1987 (Forecast)	46.0	1.71	78.5
Coarse Grains 2/			
1975	58.1	1.13	65.8
1976	60.9	1.89	115.0
1977	60.6	1.53	92.6
1978	58.0	1.82	105.4
1979	61.2	1.33	81.2
1980	57.9	1.39	80.5
1981	58.0	1.19	69.3
1982	58.0	1.58	91.8
1983	61.2	1.67	101.9
1984	59.2	1.53	90.5
1985	58.5	1.71	100.0
1986	58.6	1.81	105.9
1987 (Forecast)	60.3	1.85	111.5
Total Grain 3/			
1975	127.9	1.10	140.1
1976	127.8	1.75	223.8
1977	130.3	1.50	195.7
1978	128.5	1.85	237.4
1979	126.4	1.42	179.2
1980	126.6	1.49	189.1
1981	125.6	1.26	158.2
1982	123.0	1.52	186.8
1983	120.8	1.59	192.2
1984	119.6	1.44	172.6
1985	117.9	1.62	191.7
1986	116.5	1.80	210.1
1987 (Forecast)	116.0	1.77	205.0

1/ "Bunker weight" basis; not discounted for excess moisture or foreign material.
2/ Includes rye, barley, oats, corn, sorghum, and millet.
3/ Includes wheat, coarse grains, pulses, rice, buckwheat, and miscellaneous grains.

USSR: Total Grain, Wheat, and Coarse Grains: Supply/Utilization 1975/76-1987/88

Year	Production	Trade (Jul/Jun) Imports	Trade (Jul/Jun) Exports	Availability 1/ July/June	Total 1/	Seed	Industrial	Food	Dockage/ Waste 2/	Feed	Stock Change 3/ July/June
					(Million Metric Tons)						
					Total Grains 4/						
1975/76	140.1	26.1	0.7	166	178	25	5	45	14	89	-12
1976/77	223.8	11.0	3.3	232	220	26	5	45	31	113	+12
1977/78	195.7	18.9	2.3	212	229	26	5	45	29	124	-16
1978/79	237.4	15.6	2.8	250	230	25	6	46	28	125	+20
1979/80	179.2	31.0	0.8	209	223	26	6	46	22	123	-14
1980/81 5/	189.1	34.8	0.5	223	224	25	6	46	28	119	-1
1981/82 5/	158.2	47.3	0.5	205	211	25	5	47	16	118	-6
1982/83 5/	186.8	34.3	0.5	221	213	25	5	47	18	118	+8
1983/84 5/	192.2	32.5	0.5	224	218	26	5	47	21	120	+6
1984/85 5/	172.6	55.5	0.5	228	219	24	6	47	19	123	+9
1985/86 5/	191.7	29.9	0.5	221	218	24	5	47	18	124	+4
1986/87 5/	210.1	28.8	0.5	238	229	24	5	47	23	130	+9
Projected 1987/88	205.0	28.0	1.0	232	231	25	5	47	24	130	+1
					Wheat						
1975/76	66.2	10.1	0.5	76	86	13	1	35	7	30	-10
1976/77	96.9	4.6	1.0	100	92	13	2	35	14	28	+8
1977/78	92.2	6.6	1.0	98	109	14	2	35	14	44	-11
1978/79	120.9	5.1	1.5	124	107	13	2	35	14	43	+18
1979/80	90.2	12.0	0.5	102	114	13	2	35	11	53	-12
1980/81 5/	98.2	16.0	0.5	114	113	13	2	35	15	48	+1
1981/82 5/	81.1	20.3	0.5	101	104	11	2	36	8	47	-3
1982/83 5/	84.3	20.8	0.5	105	101	11	2	36	8	44	+4
1983/84 5/	77.5	20.5	0.5	98	93	11	2	36	9	35	+4
1984/85 5/	68.6	28.1	0.5	96	91	11	2	36	8	35	+5
1985/86 5/	78.1	15.7	0.5	93	92	11	1	36	8	36	+2
1986/87 5/	92.3	16.0	0.5	108	102	11	1	36	10	44	+6
Projected 1987/88	78.5	17.0	1.0	94	93	11	1	36	9	36	+1
					Coarse Grains						
1975/76	65.8	15.6	--	81	83	11	4	7	6	56	-2
1976/77	115.0	5.7	2.0	119	115	11	3	7	16	78	+4
1977/78	92.6	11.7	1.0	103	108	10	3	7	14	74	-5
1978/79	105.4	10.0	1.0	114	112	10	4	7	13	79	+2
1979/80	81.2	18.4	--	100	102	12	4	7	10	68	-2
1980/81 5/	80.5	18.0	--	98	101	12	4	7	12	66	-2
1981/82 5/	69.3	26.0	--	95	98	13	3	7	7	68	-3
1982/83 5/	91.8	12.5	--	104	101	13	3	7	9	69	+4
1983/84 5/	101.9	11.5	--	113	112	13	3	7	11	78	+2
1984/85 5/	90.5	26.9	--	117	114	12	4	7	10	81	+4
1985/86 5/	100.0	13.7	--	114	112	12	4	7	9	80	+2
1986/87 5/	105.9	12.3	--	118	115	12	4	7	11	81	+3
Projected 1987/88	111.5	10.0	--	122	122	13	4	7	13	85	0

1/ Availability excludes beginning stocks. Totals may not add due to rounding.
2/ Includes post harvest losses incurred in transport and storage.
3/ Minus indicates withdrawal from stocks.
4/ Total grain production, trade, and utilization figures include pulses, paddy rice, buckwheat, and miscellaneous grains in addition to wheat and coarse grains.
5/ Preliminary for trade, availability, utilization, and stocks change.

USSR IMPORTS OF WHEAT AND COARSE GRAINS BY SOURCE 1974/75-1986/87
July/June Years
(Million Metric Tons)

	1974/75	1975/76	1976/77	1977/78	1978/79	1979/80	1980/81	1981/82	1982/83	1983/84	1984/85	1985/86	Prelim. 1986/87
Wheat													
U.S. 1/	1.0	4.0	2.9	3.3	2.9	3.9	3.0	6.9	3.0	4.4	6.1	.2	.8
Canada	.3	3.2	1.2	1.7	2.0	2.1	4.5	4.8	7.0	5.8	7.6	4.8	5.9
Australia	.6	1.2	.4	.3	.1	2.7	2.5	2.4	1.0	1.6	2.1	3.2	1.3
Argentina	.6	1.2	.1	1.1	--	2.0	3.0	3.1	4.2	3.6	4.1	.7	.6
EC	--	--	--	--	--	.7	.9	1.7	3.4	3.6	6.1	5.2	6.2
Others	--	.4	--	.2	.1	.6	2.1	1.4	2.2	1.5	2.1	1.6	1.2
TOTAL*	2.5	10.1	4.6	6.7	5.1	12.1	16.0	20.3	20.8	20.5	28.1	15.7	16.0
Coarse Grains													
U.S. 1/	1.3	9.9	4.5	9.2	8.3	11.3	5.0	8.5	3.2	6.0	16.2	6.8	4.1
Canada	--	1.3	.2	.2	.1	1.3	2.3	4.4	1.8	.5	.7	.6	2.2
Australia	.1	.8	.1	--	--	1.3	.4	.1	--	.1	1.1	--	--
Argentina	1.1	.2	.2	1.6	1.4	3.1	8.2	10.2	5.4	3.3	3.9	1.3	1.3
EC	.1	.5	.2	.2	.2	.2	.6	.7	.3	.2	2.7	1.6	1.7
Others	.1	2.6	.3	.6	--	1.2	1.5	2.1	1.8	1.5	2.3	3.4	3.0
TOTAL*	2.7	15.6	5.7	11.7	10.0	18.3	18.0	26.0	12.5	11.6	26.9	13.7	12.3
Total													
U.S. 1/	2.3	13.9	7.4	12.5	11.2	15.2	8.0	15.4	6.2	10.4	22.3	7.0	4.9
Canada	.3	4.5	1.4	1.9	2.1	3.4	6.8	9.2	8.8	6.3	8.3	5.4	8.1
Australia	.7	2.0	.5	.3	.1	4.0	2.9	2.5	1.0	1.7	3.2	3.2	1.3
Argentina	1.7	1.4	.3	2.7	1.4	5.1	11.2	13.3	9.6	6.9	8.0	2.0	1.9
EC	.1	.5	.2	.2	.2	.9	1.5	2.4	3.7	3.8	8.8	6.8	7.9
Others	.1	3.0	.3	.8	.1	1.8	3.6	3.5	4.0	3.0	4.4	5.0	4.2
TOTAL *	5.2	25.7	10.3	18.4	15.1	30.4	34.0	46.3	33.3	32.1	55.0	29.4	28.3

-- Denotes less than 50,000 tons.
* Totals may not add due to rounding. Excludes rice and pulses. Included grain equivalent of flour.
1/ U.S. exports based upon Export Sales data, which normally include transshipments whereas Census data may not.

SOURCE: Based on reports of countries exporting to the USSR.

FAS, Grain and Feed Division
September 9, 1987

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FSG-8-87

August 11, 1987

Based on continued favorable growing conditions, the estimate of the 1987 Soviet grain crop has been increased and imports are expected to fall short of the earlier estimate.

1987 GRAIN CROP ESTIMATE INCREASED

The 1987 Soviet grain crop is now estimated at 205 million tons, 10 million more than last month's estimate, but still slightly less than last year's outturn of 210 million tons. The higher 1987 total crop estimate was based on increases in both the estimated area and yield. Generally favorable growing conditions in the European USSR since mid-June have raised yield expectations for small grains and pulses. The area estimate was increased by 1 million hectares to 116 million, reflecting recently released preliminary sown area numbers. The Soviet mid-year plan fulfillment report placed preliminary sown area at 117.6 million hectares. Final area in recent years has averaged about 1.5 million hectares below the preliminary figure.

The 10-million-ton increase in grain production this month includes 3 million tons of wheat, 6 million of coarse grains, and 1 million of miscellaneous grains and pulses. Favorable weather for winter wheat during filling and maturing stages has increased yield expectations. The barley estimate was increased by 5 million tons because of higher yield estimates and increased estimated area. The corn production estimate was raised 1 million tons mainly due to an increase in estimated area.

The most recent harvest progress report (August 3) stated that small grains and pulses had been cut on 28 million hectares and threshed on 21.1 million hectares. This compares with a 1980-85 average area cut of 38 million hectares.

RECENT WEATHER AND CROP DEVELOPMENTS

In the European USSR, above-normal July precipitation over the Baltics, northern Belorussia, the Volga Vyatsk, the upper Volga, and the southern North Caucasus benefited spring grains in the filling stage. July precipitation was below normal in the Central Region, southern Belorussia, the Black Soils Region, the Ukraine and the western North Caucasus. The minimal rainfall pattern in these areas favored winter grain maturation and aided early harvest activities. Spring barley in the grain filling stage and corn, approaching the reproductive stage, had to rely on soil moisture reserves to meet crop-moisture requirements. However, near-to below-normal temperatures during July minimized crop stress. By month's end, soil moisture was becoming depleted in corn areas of the Ukraine and North Caucasus.

Approved by the World Agricultural Outlook Board - USDA

In spring grain areas east of the Ural mountains, near-to above-normal July precipitation over the Urals and parts of western Kazakhstan improved moisture conditions for spring grains, which advanced through the reproductive and filling stages. Below-normal precipitation and above-normal temperatures covered spring grains in eastern Kazakhstan and central crop areas in Western Siberia.

Since early August, warm, dry weather in Kazakhstan and the southern Urals favored spring grain maturation. Light showers in the northern Urals, West Siberia, and East Siberia benefited grain-filling. In the European USSR, showers over the Ukraine and the northern North Caucasus improved moisture conditions for corn entering the filling stage. On August 7, an intense storm system developed over the northern Baltic States, the western Central Region, and the Northwest Region. This system produced moderate to heavy rain and strong winds, and likely caused some crop lodging.

IMPORTS FOR 1987/88 REDUCED

Reflecting an improved outlook for the 1987 USSR grain crop, the estimate of 1987/88 imports has been reduced by 5 million tons to 31 million. As a result, grain supplies are likely to be down somewhat from the 1986/87 level but still well above the level of any other recent year. The estimate of 1987/88 grain utilization has been increased to 231 million tons. Prospects for a larger crop along with recent harvesting difficulties have prompted an increase in the allowance for dockage and waste to 24 million tons. The dockage and waste estimate represents an approximation of the amount of excess moisture and trash in the crop and any handling and storage losses. As grain supplies for 1987/88 are still expected to exceed requirements, another modest build-up in grain stocks is likely.

The revised estimate of USSR grain imports for July-June 1987/88 includes 19 million tons of wheat, 11 million coarse grains and 1 million miscellaneous grains, pulses, and rice. So far this marketing year, USSR grain buying activity has been relatively subdued, duplicating the pattern of a year ago. Purchases from all origins are estimated in the area of 6 to 7 million tons, virtually all from northern hemisphere suppliers. The United States has been the major seller. Canada has also reportedly sold some wheat to the USSR.

Estimated imports for 1986/87 have been reduced from a month ago as shipments by both Argentina and Canada fell short of expectations. Wheat imports are now placed at 16.5 million tons and coarse grains at 12.5 million, both down 500,000 tons from a month ago.

WHEAT CROP IMPROVES BUT IMPORTS TO CONTINUE HEAVY

Some improvement in 1987 wheat crop prospects is likely to reduce USSR wheat import requirements. Wheat imports are currently forecast at 19 million tons, down 2 million from a month ago but still the highest in 3 years. The level of this year's wheat imports will depend on the quality of the 1987 Soviet wheat crop and on feed wheat import decisions. Procurement of quality wheat from the large 1986 crop was reportedly up, which may have reduced the Soviet's need for imports of high quality wheat. Feed wheat prices were very attractive, consequently, the USSR is estimated to have purchased nearly 4 million tons of feed wheat in 1986/87. Wheat crop prospects in the New Lands, the major source

of quality wheat, are down this year. In addition, cool wet weather along with other factors has delayed the harvest in the European USSR and could adversely affect quality in this major producing region. These factors could maintain or even push up the USSR's requirement for quality wheat imports. USSR imports of feed wheat will likely depend on its price competitiveness relative to other feed ingredients such as U.S. corn or Canadian and EC barley.

COARSE GRAIN IMPORTS EXPECTED TO DECLINE

With the USSR projected to harvest its largest coarse grain crop since 1976, imports are expected to be the smallest in a decade. Preliminary indications are for a very large Soviet barley crop and a good corn crop. This on top of prospects for a good forage outturn this year could r~duce pressures for the USSR to import coarse grains for the livestock sector. So far this marketing year, the USSR is believed to have purchased only small quantities of coarse grains from the world's major suppliers. In fact, the United States has yet to sell corn to the USSR for 1987/88 July-June delivery. China and Eastern Europe are expected to again be significant suppliers of coarse grains to the USSR. This year's exceptional barley crop could result in a decline in USSR barley imports, adversely affecting Canadian and EC trade. However, much will still depend on the competitiveness of barley prices relative to other grains.

U.S.-USSR GRAIN small quantities of coarse grains from the world's major suppliers. In fact, the United States has yet to sell corn to the USSR for 1987/88 July-June delivery. China and Eastern Europe are expected to again be significant suppliers of coarse grains to the USSR. This year's exceptional barley crop could result in a decline in USSR barley imports, adversely affecting Canadian and EC trade. However, much will still depend on the competitiveness of barley prices relative to other grains.

U.S.-USSR GRAINas 2 tons towards the agreement minimum.

FERTILIZER PRODUCTION UP SLIGHTLY

Soviet fertilizer production for the January-June 1987 period was 18.1 million tons, up 3 percent from the same period last year and slightly above the planned level. Fertilizer deliveries in the USSR for the first 6 months of 1987 totalled 14 million tons, reportedly 700,000 tons more than during the same period in 1986.

Production of plant protectant agents (fungicide, herbicide and insecticide) for January-June 1987 totalled 171,000 tons, almost 1 percent less than in 1986 but in line with the plan target, which also calls for the improved quality of PPA's. Although production is down, imports from the West of these agents are likely to continue to rise.

GRAIN AREA UNDER INTENSIVE TECHNOLOGY UP ABOUT 20 PERCENT

According to the Soviet mid-year Plan Fulfillment Report, over 35 million hectares of grain crops were under intensive technology in 1987, up about 20 percent from last year's roughly 29 million. This year, winter grains (primarily winter wheat) under intensive technology rose to a reported 13 million hectares, up 6 percent. Spring wheat is up 5 percent to 12.2 million hectares. These areas represent an estimated 85 percent of total winter wheat and 40 percent of spring wheat area.

LARGE FORAGE CROP LIKELY

Roughage production as of July 27 at over 45 million tons in oat unit equivalent is 8 percent above production at the same time in the record year 1986. The roughage area cut so far this year is below that of 1986 at this time, indicating record yields as well in 1987. The good results thus far appear to be largely due to the above average soil moisture supplies provided by the cool, rainy spring in the areas west of the Urals.

USSR: Harvest of Roughages as of July 27,
1982-85 average, 1984, 1985, 1986, and 1987

	1982-85 Avg. 1/	1984	1985	1986	1987
			--million hectares--		
Meadows cut	58.9	59.9	59.9	60.5 2/	N/A
			--million tons--		
Hay	42.7	41.6	43.2	49.7	52.2
Haylage	48.7	49.3	51.5	48.2	55.5
Grass meal	4.1	4.0	3.8	3.5	3.2
Total in oat unit equivalent 3/	39.22	38.84	40.14	41.69	45.05

1/ For 1982-86 data are interpolated.
2/ Estimate
3/ Using the following oat unit coefficients: hay, 0.45; haylage, 0.34; grass meal, 0.84.

Prepared by the USDA Inter-Agency Task Force on the USSR Grain Situation.

USSR Grain Area, Yield, and Production
1975-1986, and 1987 (Forecast)

Grain	Area (Million Hectares)	Yield (Metric Tons) (Per Hectare)	Production 1/ (Million) (Metric Tons)
Wheat			
1975	62.0	1.07	66.2
1976	59.5	1.63	96.9
1977	62.0	1.49	92.2
1978	62.9	1.92	120.9
1979	57.7	1.56	90.2
1980	61.5	1.60	98.2
1981	59.2	1.37	81.1
1982	57.3	1.47	84.3
1983	50.8	1.52	77.5
1984	51.1	1.34	68.6
1985	50.3	1.55	78.1
1986	48.7	1.89	92.3
1987 (Forecast)	46.0	1.71	78.5
Coarse Grains 2/			
1975	58.1	1.13	65.8
1976	60.9	1.89	115.0
1977	60.6	1.53	92.6
1978	58.0	1.82	105.4
1979	61.2	1.33	81.2
1980	57.9	1.39	80.5
1981	58.0	1.19	69.3
1982	58.0	1.58	91.8
1983	61.2	1.67	101.9
1984	59.2	1.53	90.5
1985	58.5	1.71	100.0
1986	58.6	1.81	105.9
1987 (Forecast)	60.3	1.85	111.5
Total Grain 3/			
1975	127.9	1.10	140.1
1976	127.8	1.75	223.8
1977	130.3	1.50	195.7
1978	128.5	1.85	237.4
1979	126.4	1.42	179.2
1980	126.6	1.49	189.1
1981	125.6	1.26	158.2
1982	123.0	1.52	186.8
1983	120.8	1.59	192.2
1984	119.6	1.44	172.6
1985	117.9	1.62	191.7
1986	116.5	1.80	210.1
1987 (Forecast)	116.0	1.77	205.0

1/ "Bunker weight" basis; not discounted for excess moisture or foreign material.
2/ Includes rye, barley, oats, corn, sorghum, and millet.
3/ Includes wheat, coarse grains, pulses, rice, buckwheat, and miscellaneous grains.

USSR: Total Grain, Wheat, and Coarse Grains: Supply/Utilization 1975/76-1987/88

Year	Production	Trade (Jul/Jun) Imports	Trade (Jul/Jun) Exports	Availability 1/ July/June	Total 1/	Seed	Industrial	Food	Dockage/ Waste 2/	Feed	Stock Change 3/ July/June
				(Million Metric Tons)							
					Total Grains 4/						
1975/76	140	26.1	0.7	166	178	25	5	45	14	89	-12
1976/77	224	11.0	3.3	232	220	26	5	45	31	113	+12
1977/78	196	18.9	2.3	213	229	26	5	45	29	124	-16
1978/79	237	15.6	2.8	250	230	25	6	46	28	125	+20
1979/80	179	31.0	0.8	209	223	26	6	46	22	123	-14
1980/81 5/	189	34.8	0.5	223	224	25	6	46	28	119	-1
1981/82 5/	158	47.3	0.5	205	211	25	5	47	16	118	-6
1982/83 5/	187	34.3	0.5	221	213	25	5	47	18	118	+8
1983/84 5/	192	32.5	0.5	224	218	26	5	47	21	120	+6
1984/85 5/	173	55.5	0.5	228	219	24	6	47	19	123	+9
1985/86 5/	192	29.9	0.5	221	218	24	5	47	18	124	+4
1986/87 5/	210	29.5	1.0	239	229	24	5	47	23	130	+9
Projected 1987/88	205	31.0	1.0	235	231	25	5	47	24	130	+4
					Wheat						
1975/76	66	10.1	0.5	76	86	13	1	35	7	30	-10
1976/77	97	4.6	1.0	100	92	13	2	35	14	28	+8
1977/78	92	6.6	1.0	98	109	14	2	35	14	44	-11
1978/79	121	5.1	1.5	125	107	13	2	35	14	43	+18
1979/80	90	12.0	0.5	102	114	13	2	35	11	53	-12
1980/81 5/	98	16.0	0.5	114	113	13	2	35	15	48	+1
1981/82 5/	81	20.3	0.5	101	104	11	2	36	8	47	-3
1982/83 5/	84	20.8	0.5	105	101	11	2	36	8	44	+4
1983/84 5/	78	20.5	0.5	98	93	11	2	36	9	35	+4
1984/85 5/	69	28.1	0.5	96	91	11	2	36	8	35	+5
1985/86 5/	78	15.7	0.5	93	92	11	1	36	8	36	+2
1986/87 5/	92	16.5	1.0	108	101	11	1	36	10	43	+6
Projected 1987/88	78	19.0	1.0	97	94	11	1	36	9	36	+3
					Coarse Grains						
1975/76	66	15.6	--	81	83	11	4	7	6	56	-2
1976/77	115	5.7	2.0	119	115	11	3	7	16	78	+4
1977/78	93	11.7	1.0	103	108	10	3	7	14	74	-5
1978/79	105	10.0	1.0	114	112	10	4	7	13	79	+2
1979/80	81	18.4	--	100	102	12	4	7	10	68	-2
1980/81 5/	81	18.0	--	99	101	12	4	7	12	66	-2
1981/82 5/	69	26.0	--	95	98	13	3	7	7	68	-3
1982/83 5/	92	12.5	--	104	101	13	3	7	9	69	+4
1983/84 5/	102	11.5	--	113	112	13	3	7	11	78	+2
1984/85 5/	90	26.9	--	117	114	12	4	7	10	81	+4
1985/86 5/	100	13.7	--	114	112	12	4	7	9	80	+2
1986/87 5/	106	12.5	--	118	115	12	4	7	11	81	+3
Projected 1987/88	112	11.0	--	122	121	13	4	7	13	84	+1

1/ Availability excludes beginning stocks. Totals may not add due to rounding.
2/ Includes post harvest losses incurred in transport and storage.
3/ Minus indicates withdrawal from stocks.
4/ Total grain production, trade, and utilization figures include pulses, paddy rice, buckwheat, and miscellaneous grains in addition to wheat and coarse grains.
5/ Preliminary for trade, availability, utilization, and stocks change.

USSR Total Grain Imports 1/
By Country of Origin by months
In 1,000 Metric Tons

	U.S.	Canada	Australia	EC	Argentina	Sub Total	Total 2/
July 1984	259	1,481	58	59	286	2,143	
August	1,231	1,408	115	444	330	3,528	
September	2,172	1,254	132	943	293	4,794	
July-Sept	3,662	4,143	305	1,446	909	10,465	11,300
October	2,320	809	152	966	302	4,549	
November	3,014	961	244	840	99	5,158	
December	3,535	96	100	512	230	4,473	
Oct-Dec	8,869	1,866	496	2,318	631	14,180	14,800
January 1985	2,218	98	154	599	1,082	4,151	
February	2,196	---	215	572	1,248	4,231	
March	2,023	17	667	934	926	4,567	
Jan-March	6,437	115	1,036	2,105	3,256	12,949	14,000
April	2,016	388	716	930	1,225	5,275	
May	1,566	1,237	468	921	1,368	5,560	
June	106	481	211	1,116	580	2,494	
April-June	3,688	2,106	1,395	2,967	3,173	13,329	14,700
July	8	---	25	208	443	684	
August	---	---	---	152	281	433	
September	---	1,384	---	75	59	1,518	
July-Sept	8	1,384	25	435	783	2,635	3,600
October	411	1,057	89	200	316	2,073	
November	2,487	900	212	485	423	4,507	
December	1,337	750	101	1,155	57	3,400	
Oct-Dec	4,235	2,707	402	1,840	796	9,980	11,400
January 1986	980	171	450	1,160	15	2,776	
February	956	---	494	1,080	---	2,530	
March	71	---	850	852	---	1,773	
Jan-March	2,007	171	1,794	3,092	15	7,079	7,900
April	---	---	373	487	---	860	
May	172	435	575	445	220	1,847	
June	547	646	34	582	172	1,981	
April-June	719	1,081	982	1,514	392	4,688	6,400
July	---	604	---	51	---	655	
August	---	501	---	50 3/	---	551	
September	---	666	14	50 3/	---	730	
July-September	---	1,771	14	151 3/	---	1,936	2,600
October	---	1,027	211	314 3/	---	1,552	
November	--	1,264	300	640 3/	---	2,204	
December	---	1,198	129	740 3/	---	2,067	
October-December	---	3,489	640	1,694 3/	---	5,823	6,900
January 1987	---	383	153	642 3/	75	1,253	
February	---	207	101	1,140 3/	330	1,778	
March	316	497	134	1,165 3/	303	2,415	
Jan-March	316	1,087	388	2,947 3/	708	5,446	6,600
April	1,753	1,018	129	1,452 3/	765	5,117	
May	1,840	777	123	1,000 3/	412	4,152	
June	978	11	13	600 3/	40	1,642	
April-June	4,571	1,806	265	3,052 3/	1,217	10,911	12,900

1/ Based on reported exports for countries enumerated and estimates for other countries to the USSR; excludes rice, buckwheat, millet, and other miscellaneous grains and pulses. Includes grain equivalent of flour.
2/ Partially estimated including tentative estimates for countries not enumerated, or for countries from which data is not available.
3/ Preliminary
N/A Not Available

FAS, Grain and Feed Division
August 10, 1987

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July 1987

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PROCESSING

Propsects for the 1987 grain crop remain favorable despite localized problems. Trade and utilization estimates are unchanged from a month ago.

1987 CROP ESTIMATE UNCHANGED

The 1987 Soviet grain crop continues to be estimated at 195 million tons including 75.5 million wheat, 105.5 million coarse grains and 14.0 million miscellaneous grains and pulses. The total grain area estimate also remains unchanged at 115.0 million hectares. All estimates of area, yield, and therefore production remain unchanged from last month.

Soviet press accounts in early June indicated that the 1987 grain crop is experiencing insect and disease problems in some areas. Dense grain stands, resulting from improved soil fertility and high levels of soil moisture, reportedly were most affected. These factors could adversly impact the quality of the Soviet grain crops in these areas.

RECENT WEATHER AND CROP DEVELOPMENTS

In the European USSR, above-normal June precipitation covered crop areas in the Baltic States, Belorussia, the Central Region, the Black Soils Region, the central and eastern Ukraine, and the North Caucasus. Twice the normal amount of precipitation fell over the eastern Black Soils Region, and the western North Caucasus. However, June precipitation was below-normal over the southwestern Ukraine, the Volga, and the Volga Vyatsk Regions. During June, winter grains flowered, spring barley advanced into the heading stage, and corn was in the vegetative stage. Soil moisture was ample to surplus for crop growth in most areas. Weather conditions were unfavorably dry for crops in the Volga, the Volga Vyatsk and the Urals. On June 11, unseasonably hot, dry weather spread north and east into the Volga, the Volga Vyatsk, and the Urals. This unfavorably hot, dry weather continued until month's end, stressing spring grains entering the heading stage.

Approved by the World Agricultural Outlook Board – USDA

In spring grain areas east of the Ural mountains, hot dry weather from the Volga and Urals region moved into western Kazakhstan, reducing soil moisture and probably accelerating crop growth. From June 20 through June 30, daytime maximum temperatures ranged from 32 to 38 degrees C with minimum temperatures dropping to around 20 degrees C. Farther east in Western and Eastern Siberia, near to above-normal precipitation favored spring grains in the vegetative stage. Below-normal temperatures in these areas slowed crop growth.

In early July, a cooling trend and widespread showers spread slowly eastward, improving conditions for spring grains in the Volga, Volga Vyatsk, Urals and western Kazakhstan. Recently, soaking rains fell over some of these areas. Generally mild, dry weather favored winter grain maturation in southern areas of European USSR.

1987/88 IMPORT ESTIMATE HOLDS

The estimate of USSR grain imports for the 1987/88 marketing year remains at 36 million tons, including 21 million of wheat, 14 million coarse grains, and one million rice, pulses and miscellaneous grains. USSR grain purchases from all origins for delivery in 1987/88 are estimated between 5-6 million tons. The United States is the principal seller with over 3 million tons of wheat currently on the books. Canada is also believed to have significant sales including both old and new crop wheat and barley. Old-crop shipments of wheat and coarse grains by Australia and Argentina are nearly completed so any additional sales will likely have to come from new crop supplies this fall. As yet, there have been no reports of EC grain sales to the USSR for 1987/88 delivery.

The estimate of total grain imports for 1986/87, at 30.5 million tons, is unchanged from a month ago, including 17 million wheat and 13 million coarse grains.

WHEAT CROP DOWN FROM A YEAR AGO; IMPORTS TO CLIMB

The 1987 wheat crop, currently estimated at 75.5 million tons, is the second smallest in over a decade. The reduced crop is expected to result in a significant increase in USSR wheat imports in 1987/88. A major uncertainty is the level of feed quality wheat imports. In 1986/87, with total wheat imports estimated at 17 million tons, feed quality wheat imports are believed to have totaled nearly 4 million tons. Canada and the U.K. were the largest suppliers. It seems likely that, given the recent competitive offering prices for feed wheat and the USSR's traditional use of wheat as a feed, that feed wheat imports would again be large in 1987/88. With total wheat supplies down from 1986/87's relatively high level, wheat disappearance in 1987/88 is expected to dip slightly from the year earlier level. The USSR is again expected to add modestly to wheat stocks in 1987/88.

COARSE GRAIN SUPPLIES LARGE

Coarse grain supplies in 1987/88 are expected to continue large. The 1987 crop, estimated at almost 106 million tons, is one of the largest in years with barley crop prospects particularly bright. Even with a good crop anticipated, coarse grain imports are expected to continue fairly large. The current import estimate of 14 million tons is basically covered by expected purchases under their various grain agreements. Coarse grain utilization is projected to be the highest on record, as high livestock inventories, and a slow early forage harvest are both contributing to a strong feeding picture for coarse grains.

TOTAL GRAIN USE UNCHANGED

The estimate of grain utilization in 1987/88 continues at 228 million tons. Grain for feed, the largest single use item, is currently projected at 130 million tons, unchanged from last year's record level. Feed, seed and industrial use account for another 77 million tons. The allowance for dockage and waste continues at about 11 percent of the crop or 21 million tons. However, if harvesting difficulties develop, this allowance could increase. The dockage and waste estimate represents an approximation of the amount of excess moisture and trash in the crop and any handling and storage losses.

U.S.-USSR GRAIN TRADE

As of July 2, USSR purchases of grain during the fourth year of the U.S.-USSR Long Term Grain Agreement (LTA) totaled 8.1 million tons including 4 million tons of wheat and 4.1 million of corn. The LTA calls for minimum grain trade of 9 million tons. As the USSR has already purchased the required minimum of wheat and coarse grains, the balance of their purchases can be either wheat, corn or soybeans/soybean meal with each ton of soybeans/soybean meal counting as 2 tons towards the agreement minimum.

Prepared by the USDA Inter-Agency Task Force on the USSR Grain Situation

USSR Grain Area, Yield, and Production
1975-1986, and 1987 (Forecast)

Grain	Area (Million Hectares)	Yield (Metric Tons) (Per Hectare)	Production 1/ (Million) (Metric Tons)
Wheat			
1975	62.0	1.07	66.2
1976	59.5	1.63	96.9
1977	62.0	1.49	92.2
1978	62.9	1.92	120.9
1979	57.7	1.56	90.2
1980	61.5	1.60	98.2
1981	59.2	1.37	81.1
1982	57.3	1.47	84.3
1983	50.8	1.52	77.5
1984	51.1	1.34	68.6
1985	50.3	1.55	78.1
1986	48.7	1.89	92.3
1987 (Forecast)	46.0	1.64	75.5
Coarse Grains 2/			
1975	58.1	1.13	65.8
1976	60.9	1.89	115.0
1977	60.6	1.53	92.6
1978	58.0	1.82	105.4
1979	61.2	1.33	81.2
1980	57.9	1.39	80.5
1981	58.0	1.19	69.3
1982	58.0	1.58	91.8
1983	61.2	1.67	101.9
1984	59.2	1.53	90.5
1985	58.5	1.71	100.0
1986	58.6	1.81	105.9
1987 (Forecast)	59.3	1.78	105.5
Total Grain 3/			
1975	127.9	1.10	140.1
1976	127.8	1.75	223.8
1977	130.3	1.50	195.7
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1987 (Forecast)	115.0	1.70	195.0

1/ "Bunker weight" basis; not discounted for excess moisture or foreign material.
2/ Includes rye, barley, oats, corn, sorghum, and millet.
3/ Includes wheat, coarse grains, pulses, rice, buckwheat, and miscellaneous grains.

USSR: Total Grain, Wheat, and Coarse Grains: Supply/Utilization 1975/76-1987/88

Year	Production	Trade (Jul/Jun) Imports	Trade (Jul/Jun) Exports	Availability 1/ July/June	Total 1/	Seed	Industrial	Food	Dockage/ Waste 2/	Feed	Stock Change 3/ July/June
					(Million Metric Tons)						
					Total Grains 4/						
1975/76	140	26.1	0.7	166	178	25	5	45	14	89	-12
1976/77	224	11.0	3.3	232	220	26	5	45	31	113	+12
1977/78	196	18.9	2.3	213	229	26	5	45	29	124	-16
1978/79	237	15.6	2.8	250	230	25	6	46	28	125	+20
1979/80	179	31.0	0.8	209	223	26	6	46	22	123	-14
1980/81 5/	189	34.8	0.5	223	224	25	6	46	28	119	-1
1981/82 5/	158	47.3	0.5	205	211	25	5	47	16	118	-6
1982/83 5/	187	34.3	0.5	221	213	25	5	47	18	118	+8
1983/84 5/	192	32.5	0.5	224	218	26	5	47	21	120	+6
1984/85 5/	173	55.5	0.5	228	219	24	6	47	19	123	+9
1985/86 5/	192	29.9	0.5	221	218	24	5	47	18	124	+4
1986/87 5/	210	30.5	1.0	240	229	24	5	47	23	130	+10
Projected 1987/88	195	36.0	1.0	230	228	25	5	47	21	130	+2
					Wheat						
1975/76	66	10.1	0.5	76	86	13	1	35	7	30	-10
1976/77	97	4.6	1.0	100	92	13	2	35	14	28	+8
1977/78	92	6.6	1.0	98	109	14	2	35	14	44	-11
1978/79	121	5.1	1.5	125	107	13	2	35	14	43	+18
1979/80	90	12.0	0.5	102	114	13	2	35	11	53	-12
1980/81 5/	98	16.0	0.5	114	113	13	2	35	15	48	+1
1981/82 5/	81	20.3	0.5	101	104	11	2	36	8	47	-3
1982/83 5/	84	20.8	0.5	105	101	11	2	36	8	44	+4
1983/84 5/	78	20.5	0.5	98	93	11	2	36	9	35	+4
1984/85 5/	69	28.1	0.5	96	91	11	2	36	8	35	+5
1985/86 5/	78	15.7	0.5	93	92	11	1	36	8	36	+2
1986/87 5/	92	17.0	1.0	108	101	11	1	36	10	43	+7
Projected 1987/88	76	21.0	1.0	96	94	11	1	36	8	38	+2
					Coarse Grains						
1975/76	66	15.6	--	81	83	11	4	7	6	56	-2
1976/77	115	5.7	2.0	119	115	11	3	7	16	78	+4
1977/78	93	11.7	1.0	103	108	10	3	7	14	74	-5
1978/79	105	10.0	1.0	114	112	10	4	7	13	79	+2
1979/80	81	18.4	--	100	102	12	4	7	10	68	-2
1980/81 5/	81	18.0	--	99	101	12	4	7	12	66	-2
1981/82 5/	69	26.0	--	95	98	13	3	7	7	68	-3
1982/83 5/	92	12.5	--	104	101	13	3	7	9	69	+4
1983/84 5/	102	11.5	--	113	112	13	3	7	11	78	+2
1984/85 5/	90	26.9	--	117	114	12	4	7	10	81	+4
1985/86 5/	100	13.7	--	114	112	12	4	7	9	80	+2
1986/87 5/	106	13.0	--	119	116	12	4	7	11	82	+3
Projected 1987/88	106	14.0	--	120	120	13	4	7	11	85	0

1/ Availability excludes beginning stocks. Totals may not add due to rounding.
2/ Includes post harvest losses incurred in transport and storage.
3/ Minus indicates withdrawal from stocks.
4/ Total grain production, trade, and utilization figures include pulses, paddy rice, buckwheat, and miscellaneous grains in addition to wheat and coarse grains.
5/ Preliminary for trade, availability, utilization, and stocks change.

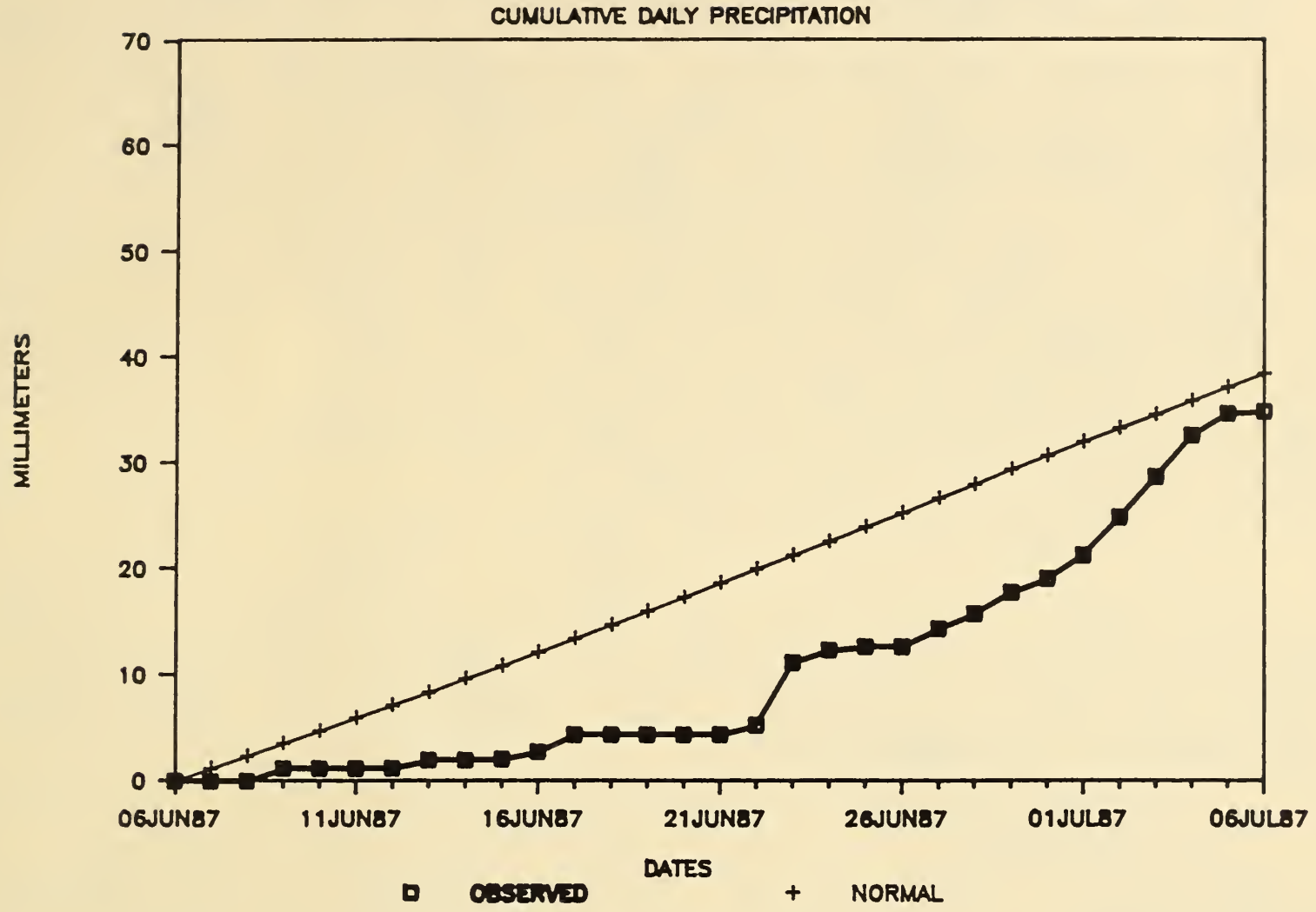
USSR Total Grain Imports 1/
By Country of Origin by months
In 1,000 Metric Tons

	U.S.	Canada	Australia	EC	Argentina	Sub Total	Total 2/
July 1984	259	1,481	58	59	286	2,143	
August	1,231	1,408	115	444	330	3,528	
September	2,172	1,254	132	943	293	4,794	
July-Sept	3,662	4,143	305	1,446	909	10,465	11,300
October	2,320	809	152	966	302	4,549	
November	3,014	961	244	840	99	5,158	
December	3,535	96	100	512	230	4,473	
Oct-Dec	8,869	1,866	496	2,318	631	14,180	14,800
January 1985	2,218	98	154	599	1,082	4,151	
February	2,196	---	215	572	1,248	4,231	
March	2,023	17	667	934	926	4,567	
Jan-March	6,437	115	1,036	2,105	3,256	12,949	14,000
April	2,016	388	716	930	1,225	5,275	
May	1,566	1,237	468	921	1,368	5,560	
June	106	481	211	1,116	580	2,494	
April-June	3,688	2,106	1,395	2,967	3,173	13,329	14,700
July	8	---	25	208	443	684	
August	---	---	---	152	281	433	
September	---	1,384	---	75	59	1,518	
July-Sept	8	1,384	25	435	783	2,635	3,600
October	411	1,057	89	200	316	2,073	
November	2,487	900	212	485	423	4,507	
December	1,337	750	101	1,155	57	3,400	
Oct-Dec	4,235	2,707	402	1,840	796	9,980	11,400
January 1986	980	171	450	1,160	15	2,776	
February	956	---	494	1,080	---	2,530	
March	71	---	850	852	---	1,773	
Jan-March	2,007	171	1,794	3,092	15	7,079	7,900
April	---	---	373	487	---	860	
May	172	435	575	445	220	1,847	
June	547	646	34	582	172	1,981	
April-June	719	1,081	982	1,514	392	4,688	6,400
July	---	604	---	51	---	655	
August	---	501	---	50 3/	---	551	
September	---	666	14	50 3/	---	730	
July-September	---	1,771	14	151 3/	---	1,936	2,600
October	---	1,027	211	314 3/	---	1,552	
November	--	1,264	300	640 3/	---	2,204	
December	---	1,198	129	740 3/	---	2,067	
October-December	---	3,489	640	1,694 3/	---	5,823	6,900
January 1987	---	383	153	642 3/	75	1,253	
February	---	207	101	900 3/	330	1,778	
March	316	497	134	1,165 3/	303	2,415	
Jan-March	316	1,087	388	2,947 3/	708	5,446	6,500
April	1,753	1,018	129	1,452 3/	765	5,117	
May	1,840	777	123	N/A	382	3,122	

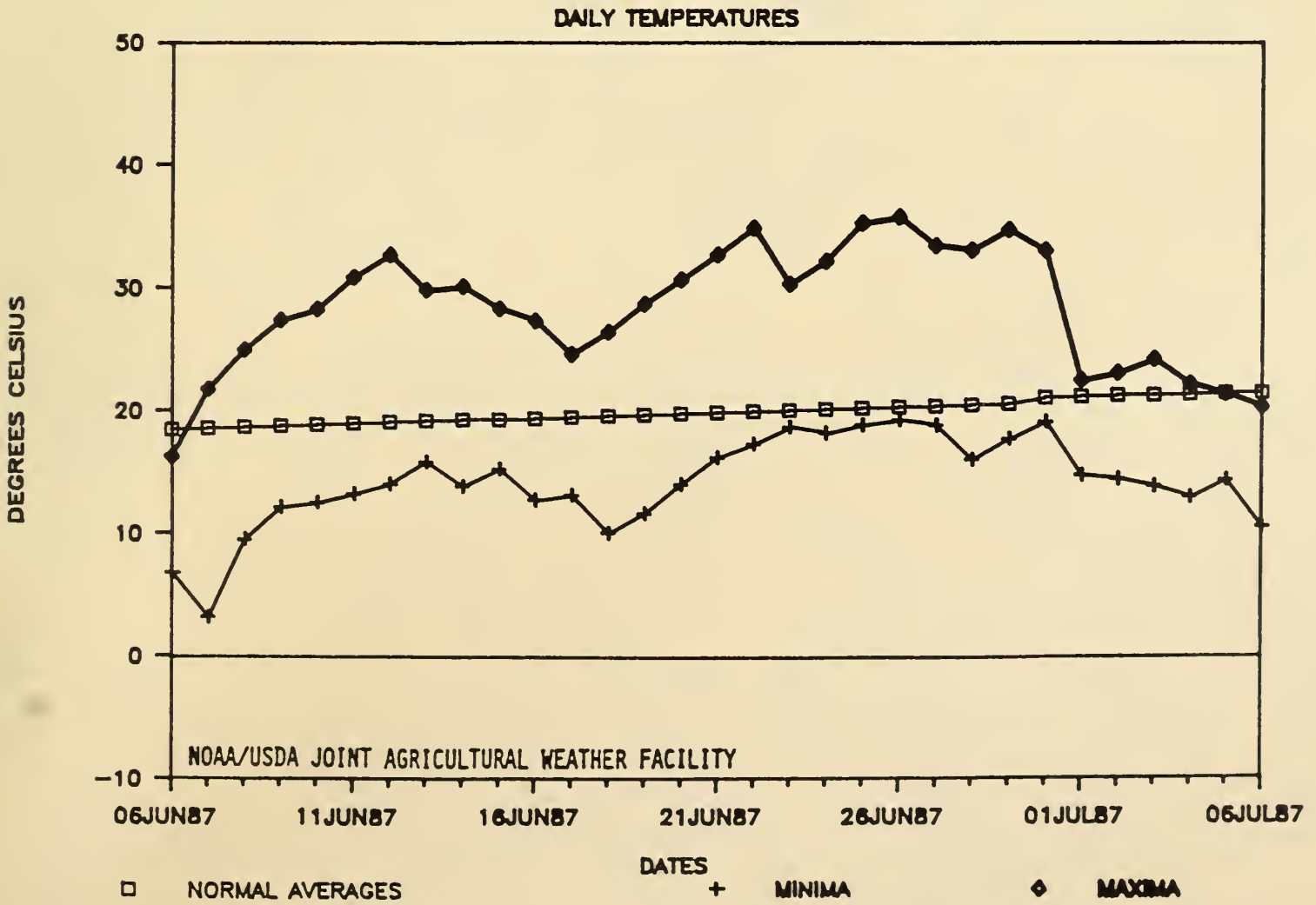
1/ Based on reported exports for countries enumerated and estimates for other countries to the USSR; excludes rice, buckwheat, millet, and other miscellaneous grains and pulses. Includes grain equivalent of flour.
2/ Partially estimated including tentative estimates for countries not enumerated, or for countries from which data is not available.
3/ Preliminary
N/A Not Available

FAS, Grain and Feed Division
July 9, 1987

EASTERN UPPER VOLGA & SOUTHERN URALS



EASTERN UPPER VOLGA & SOUTHERN URALS



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Circular Series
SG-6-87
June 1987

USSR Grain Situation and Outlook

JUL 17 1987

The outlook for USSR grain supplies and disappearance in 1987/88 is unchanged from a month ago. While there was a reduction in the estimate of grain area for the 1987 crop, the crop estimate remains at 195 million tons.

1987 CROP ESTIMATE UNCHANGED

The estimate of the 1987 Soviet grain crop remains unchanged at 195 million tons this month. However, due to the lateness of spring this year, the total grain area estimate has been reduced by 1.3 million hectares to 115 million, the lowest since 1959. Reductions in corn and spring barley area account for this decline. While estimated corn yields remain unchanged from a month ago, yield estimates for spring wheat and spring barley were increased.

Spring seeding of small grains and pulses picked up dramatically in the third week of May, after lagging significantly behind the normal pace during April and early May. Warmer and drier weather in the week of May 18-25 facilitated the sowing of 22.8 million hectares, a near record for planting in one week. As of June 1, area sown to small grains and pulses totalled 78.6 million hectares--an increase of 16.6 million hectares from the previous week--bringing it up to near normal levels for this date.

RECENT WEATHER AND CROP DEVELOPMENTS

April's persistent cold, wet weather pattern over Soviet crop areas was replaced by a steady rise in temperatures during May. In the European USSR, below-normal May precipitation, mostly in the form of scattered showers, covered Moldavia, the eastern Ukraine, the northern North Caucasus, the eastern Black Soils Region, and the Volga. The variable precipitation pattern in these areas caused only minor delays in spring planting, and allowed the planting pace to increase steadily during the month. Soil moisture was ample for winter grains in the vegetative stage. Above-normal May precipitation likely caused some planting delays in the Baltics, the western Ukraine, and the Central Region. Since early June, beneficial showers (14 to 30mm) over the Volga reversed the drying trend which began over the region in May. Winter grains in the southern Ukraine, North Caucasus, and the lower Volga were entering the moisture-sensitive heading stage about 2 weeks later than usual. At present, moisture conditions in the European USSR continue favorable for winter grains and spring-sown crops, but cool weather continues to slow spring crop emergence and winter wheat growth.

In crop areas east of the Ural mountains, spring grain sowing took place during May under mostly favorable weather conditions. Above-normal precipitation in central and eastern areas provided favorable topsoil moisture needed for

Approved by the World Agricultural Outlook Board - USDA

U.S. Grain Exports to the USSR
October-September
1,000 Tons

Year	Agreement Minimum	Wheat	Corn	Total
1976/77	6,000	3,064	3,052	6,116
1977/78	6,000	3,453	11,132	14,585
1978/79	6,000	3,971	11,530	15,501
1979/80	6,000	2,171	5,768	7,939
1980/81	6,000	3,780	5,738	9,518
1981/82	6,000	6,097	7,772	13,869
1982/83	6,000	2,999	3,208	6,207
1983/84 1/	9,000	7,593	6,476	14,069
1984/85	9,000	2,887. 2/	15,750	18,637
1985/86 1/	9,000	153. 2/	6,808	6,961
1986/87 3/	9,000	4,000	4,057	8,057
1987/88	9,000	---	---	---

1/ Soybeans were also sold to the USSR in these two years
2/ The USSR failed to purchase minimum required quantities of wheat
3/ Through June 9, 1987

USSR: Livestock Inventories on State and Collective Farms
May 1, 1982-1987

Inventories	1982	1983	1984	1985	1986	1987
			-- Thousand Head --			
Total cattle	94.5	95.9	97.9	98.3	98.9	98.8
of which cows	29.9	29.9	29.8	29.6	29.3	29.1
Hogs	55.0	57.4	59.2	57.4	58.9	59.0
Sheep and Goats	146.5	147.7	148.7	143.6	146.5	145.5
Poultry	746.8	768.3	781.0	787.8	802.2	818.3

USSR: Livestock Production on State and Collective Farms
January-April, cumulative, 1983-87

	1983	1984	1985	1986	1987
		-- Thousand Tons --			
Meat, Liveweight	5,172	5,595	5,959	6,406	6,949
Milk	19,059	20,094	20,001	22,290	23,380
Eggs, million pieces	17,023	17,666	17,990	19,213	19,715

uniform seed emergence and early plant establishment. A drying trend took place during the month in crop areas around Orenburg; however, recent showers in these areas improved moisture conditions. May temperatures were above normal in most areas, helping to dry topsoils for planting. Recently, scattered frost occurred over the northern half of the region, but little, if any, damage to newly emerged spring crops likely occurred.

IMPORT ESTIMATE FOR 1987/88 UNCHANGED

Despite the recent USSR purchases of U.S. grain, Soviet grain buying activity has been relatively slow to develop for the 1987/88 marketing year. Purchases to date are thought to total only around 3 million tons against a total import estimate of 36 million. The United States and Canada are believed to have accounted for the bulk of the early sales. The United States has already sold 2.5 million tons of wheat for July-forward delivery. The Canadian sales reflect wrap-up business from the 1986/87 Canadian marketing year (August-July) campaign. Recent reports indicate that Canada and the USSR will soon be meeting to discuss purchases for 1987/88. The two major Southern Hemisphere suppliers, Argentina and Australia, have either completed or are close to completing shipments from the 1986 crop. Total USSR grain imports in 1987/88 are expected to be comprised of 21 million tons of wheat, 14 million coarse grains and one million miscellaneous grains.

DOMESTIC USE ESTIMATE HOLDS

Domestic grain utilization in 1987/88 is projected at 228 million tons, unchanged from the month earlier estimate. Grain for feed will continue to account for more than half the Soviet Union's annual grain requirements. Another year of expected strong growth in the livestock sector should keep 1987/88 feed utilization near to above the year earlier record level of 130 million tons. However, it is estimated that the Soviets will again be able to add modestly to grain stocks in 1987/88.

USSR PURCHASES U.S. WHEAT

USSR purchases of U.S. grain during the fourth year of the U.S.-USSR Long Term Grain Agreement (LTA) have risen to over 8 million tons, including 4 million tons each wheat and corn. The agreement requires that the USSR purchase 9 million tons of U.S. grain annually of which a minimum 4 million must be wheat and 4 million corn. The remaining one million can be either wheat, corn, or soybeans or soybean meal with each ton of soybean/soybean meal counting as two tons towards the agreement minimums. During May, USSR grain buyers purchased 4 million tons of U.S. wheat for delivery during the June-August 1987 period. The selling price for this wheat, which was sold under the Export Enhancement Program (EEP), was $80 per ton with an average subsidy to sellers of $41.96 per ton.

1986/87 IMPORT ESTIMATE INCREASED AGAIN

A severe winter and delayed spring which substantially increased feed requirements along with concern about the 1987 winter grain crop may be contributing to the heavy late season grain import pace. Total grain imports during the April-June quarter are now projected at around 14 million tons, second only to the same period in 1985 when total marketing year imports were

headed towards a record-shattering 55.5 million tons. In sharp contrast to earlier quarters, the United States has been the principal shipper recently.

A portion of the recent USSR wheat purchases under the EEP is expected to be shipped during the month of June. This, along with the continued heavy pace of Canadian and EC wheat shipments, has prompted a one million ton increase, to 17 million tons, in the estimate of 1986/87 wheat imports. The estimate of coarse grain imports is unchanged from a month ago at 13 million tons. The estimate of miscellaneous grains, rice and pulse imports, previously carried at one million tons, has been reduced to 500,000 tons as there continues to be little sign of USSR purchases of these commodities in the world market. The estimate of total grain imports, reflecting the higher wheat imports, has been increased by 500,000 tons to 30.5 million tons. This represents the sixth time since 1978/79 that USSR grain imports have exceeded 30 million tons. The modest change in total imports had virtually no impact on the total grain utilization estimates.

ROUGHAGE CROP AREA EXPECTED TO INCREASE

Area planted to roughage crops is expected to increase in 1987. As of June 1, although spring seeding of small grains and pulses lagged slightly behind the average pace, other spring crops (70 percent of which are roughage crops) were nearly 3 million hectares ahead of the average. Expanded non-grain feed area can be largely explained by the additional requirements for animal feed this year due to the severe winter and the delayed spring which prevented livestock from pasture feeding. In 1986, forage crop area increased 1.6 million hectares to 71.4 million hectares.

LIVESTOCK PRODUCTION UP STRONGLY

As of May 1, cattle and hog inventories on state and collective farms were slightly below record levels. Since December 1, the growth in cattle inventories was below average and the seasonal drawdown in hog inventories was above average. During April, poultry numbers recovered to record levels.

Productivity improvements registered in 1986 appear to be continuing in 1987. Livestock production on state and collective farms in the first four months of the year increased strongly. Meat production was up 8 percent, milk production 5 percent, and egg production 3 percent.

Prepared by the USDA Inter-Agency Task Force on the USSR Grain Situation.

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1975-1986, and 1987 (Forecast)

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1983	61.2	1.67	101.9
1984	59.2	1.53	90.5
1985	58.5	1.71	100.0
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Total Grain 3/			
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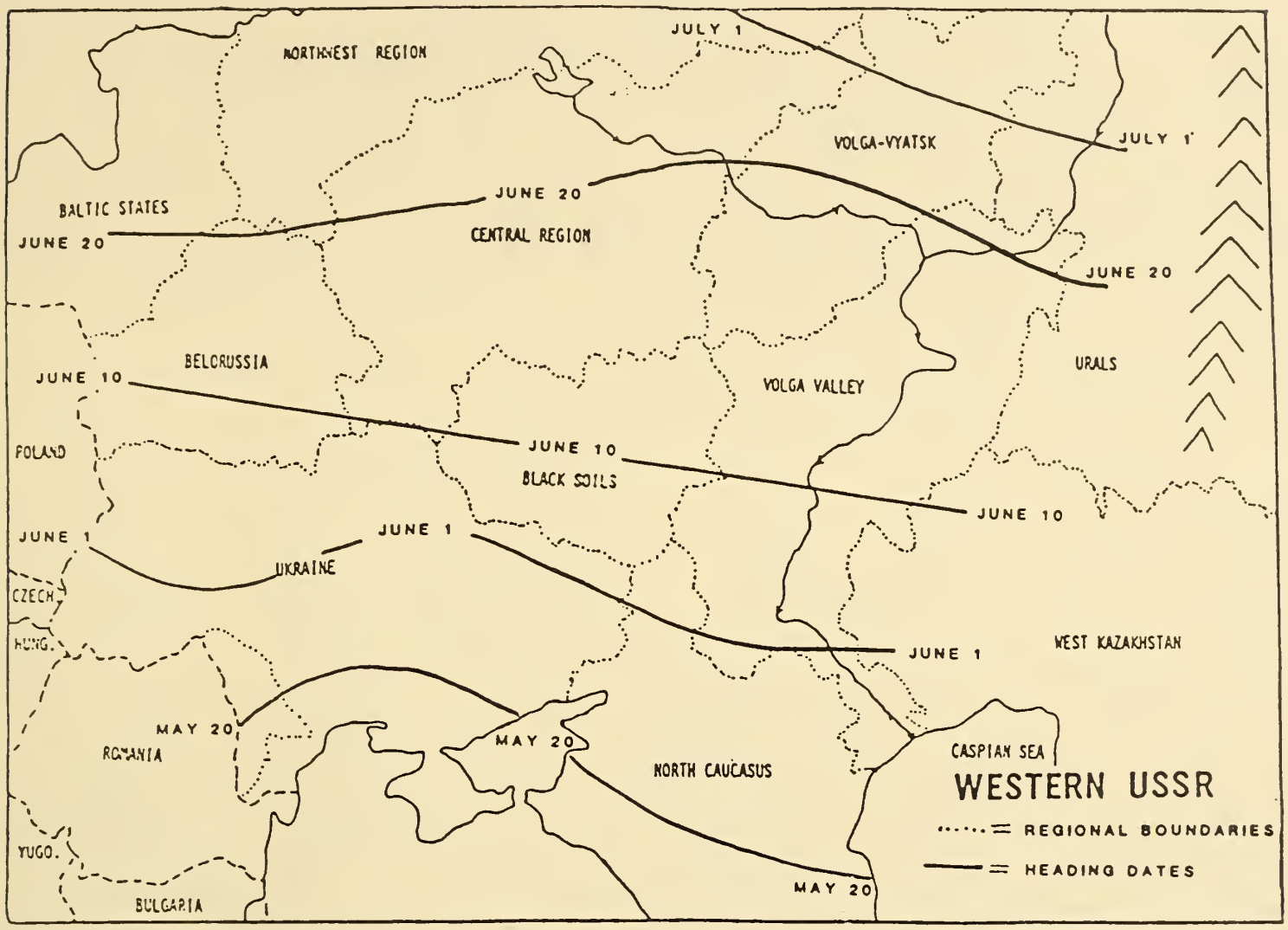
USSR: Total Grain, Wheat, and Coarse Grains: Supply/Utilization 1975/76-1986/87

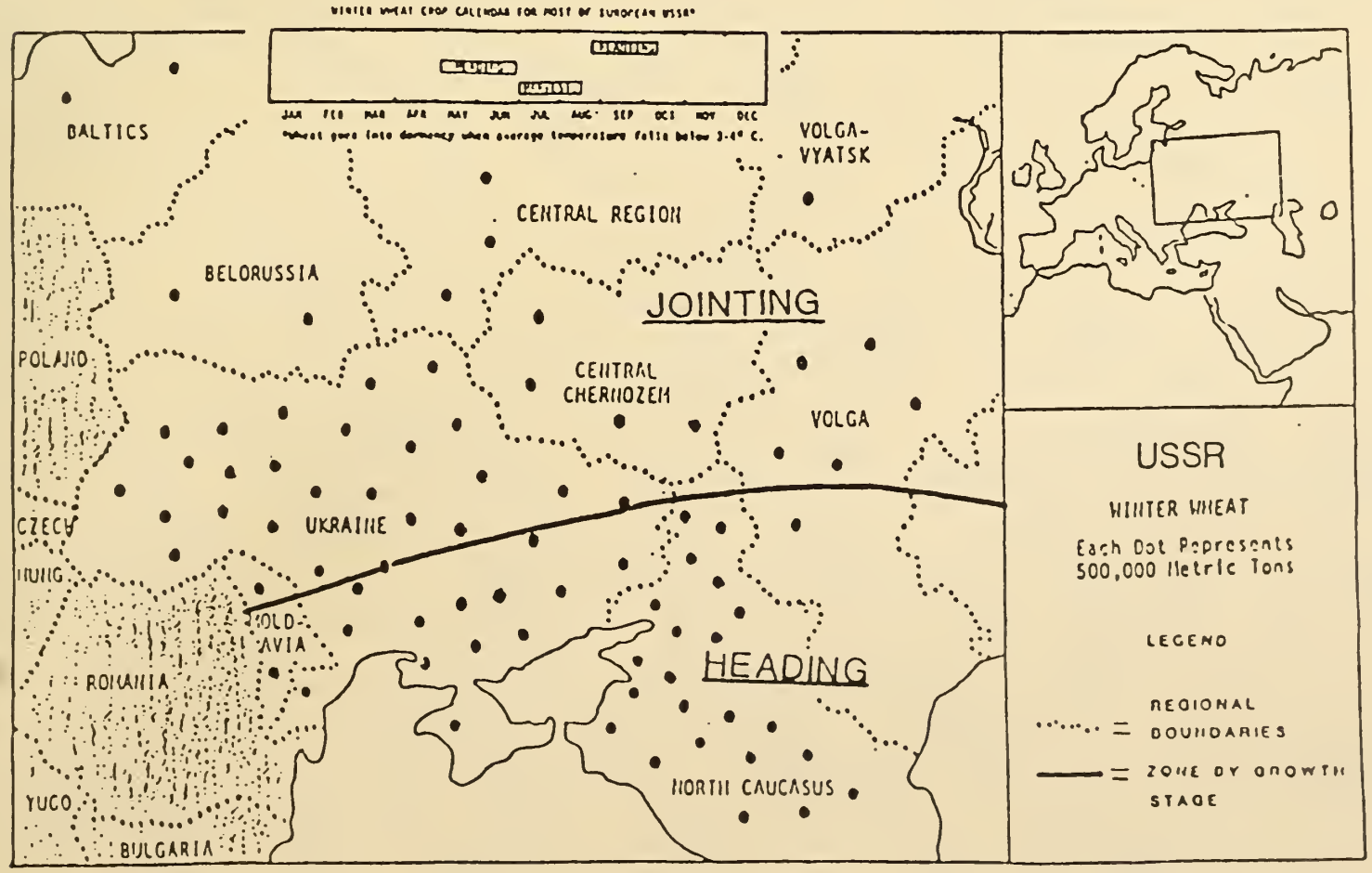
Year	Production	Trade (Jul/Jun) Imports	Trade (Jul/Jun) Exports	Availability 1/ July/June	Total 1/	Seed	Industrial	Food	Dockage/ Waste 2/	Feed	Stock Change 3/ July/June
					(Million Metric Tons)						
					Total Grains 4/						
1975/76	140	26.1	0.7	166	178	25	5	45	14	89	-12
1976/77	224	11.0	3.3	232	220	26	5	45	31	113	+12
1977/78	196	18.9	2.3	213	229	26	5	45	29	124	-16
1978/79	237	15.6	2.8	250	230	25	6	46	28	125	+20
1979/80	179	31.0	0.8	209	223	26	6	46	22	123	-14
1980/81 5/	189	34.8	0.5	223	224	25	6	46	28	119	-1
1981/82 5/	158	47.3	0.5	205	211	25	5	47	16	118	-6
1982/83 5/	187	34.3	0.5	221	213	25	5	47	18	118	+8
1983/84 5/	192	32.5	0.5	224	218	26	5	47	21	120	+6
1984/85 5/	173	55.5	0.5	228	219	24	6	47	19	123	+9
1985/86 5/	192	29.9	0.5	221	218	24	5	47	18	124	+4
1986/87 5/	210	30.5	1.0	240	229	24	5	47	23	130	+10
Projected 1987/88	195	36.0	1.0	230	228	25	5	47	21	130	+2
					Wheat						
1975/76	66	10.1	0.5	76	86	13	1	35	7	30	-10
1976/77	97	4.6	1.0	100	92	13	2	35	14	28	+8
1977/78	92	6.6	1.0	98	109	14	2	35	14	44	-11
1978/79	121	5.1	1.5	125	107	13	2	35	14	43	+18
1979/80	90	12.0	0.5	102	114	13	2	35	11	53	-12
1980/81 5/	98	16.0	0.5	114	113	13	2	35	15	48	+1
1981/82 5/	81	20.3	0.5	101	104	11	2	36	8	47	-3
1982/83 5/	84	20.8	0.5	105	101	11	2	36	8	44	+4
1983/84 5/	78	20.5	0.5	98	93	11	2	36	9	35	+4
1984/85 5/	69	28.1	0.5	96	91	11	2	36	8	35	+5
1985/86 5/	78	15.7	0.5	93	92	11	1	36	8	36	+2
1986/87 5/	92	17.0	1.0	108	101	11	1	36	10	43	+7
Projected 1987/88	76	21.0	1.0	96	94	11	1	36	8	38	+2
					Coarse Grains						
1975/76	66	15.6	--	81	83	11	4	7	6	56	-2
1976/77	115	5.7	2.0	119	115	11	3	7	16	78	+4
1977/78	93	11.7	1.0	103	108	10	3	7	14	74	-5
1978/79	105	10.0	1.0	114	112	10	4	7	13	79	+2
1979/80	81	18.4	--	100	102	12	4	7	10	68	-2
1980/81 5/	81	18.0	--	99	101	12	4	7	12	66	-2
1981/82 5/	69	26.0	--	95	98	13	3	7	7	68	-3
1982/83 5/	92	12.5	--	104	101	13	3	7	9	69	+4
1983/84 5/	102	11.5	--	113	112	13	3	7	11	78	+2
1984/85 5/	90	26.9	--	117	114	12	4	7	10	81	+4
1985/86 5/	100	13.7	--	114	112	12	4	7	9	80	+2
1986/87 5/	106	13.0	--	119	116	12	4	7	11	82	+3
Projected 1987/88	106	14.0	--	120	120	13	4	7	11	85	0

1/ Availability excludes beginning stocks. Totals may not add due to rounding.
2/ Includes post harvest losses incurred in transport and storage.
3/ Minus indicates withdrawal from stocks.
4/ Total grain production, trade, and utilization figures include pulses, paddy rice, buckwheat, and miscellaneous grains in addition to wheat and coarse grains.
5/ Preliminary for trade, availability, utilization, and stocks change.

AVERAGE DATES FOR THE START OF WINTER WHEAT HEADING



WINTER WHEAT CROP PROGRESS BY JUNE 9, 1987



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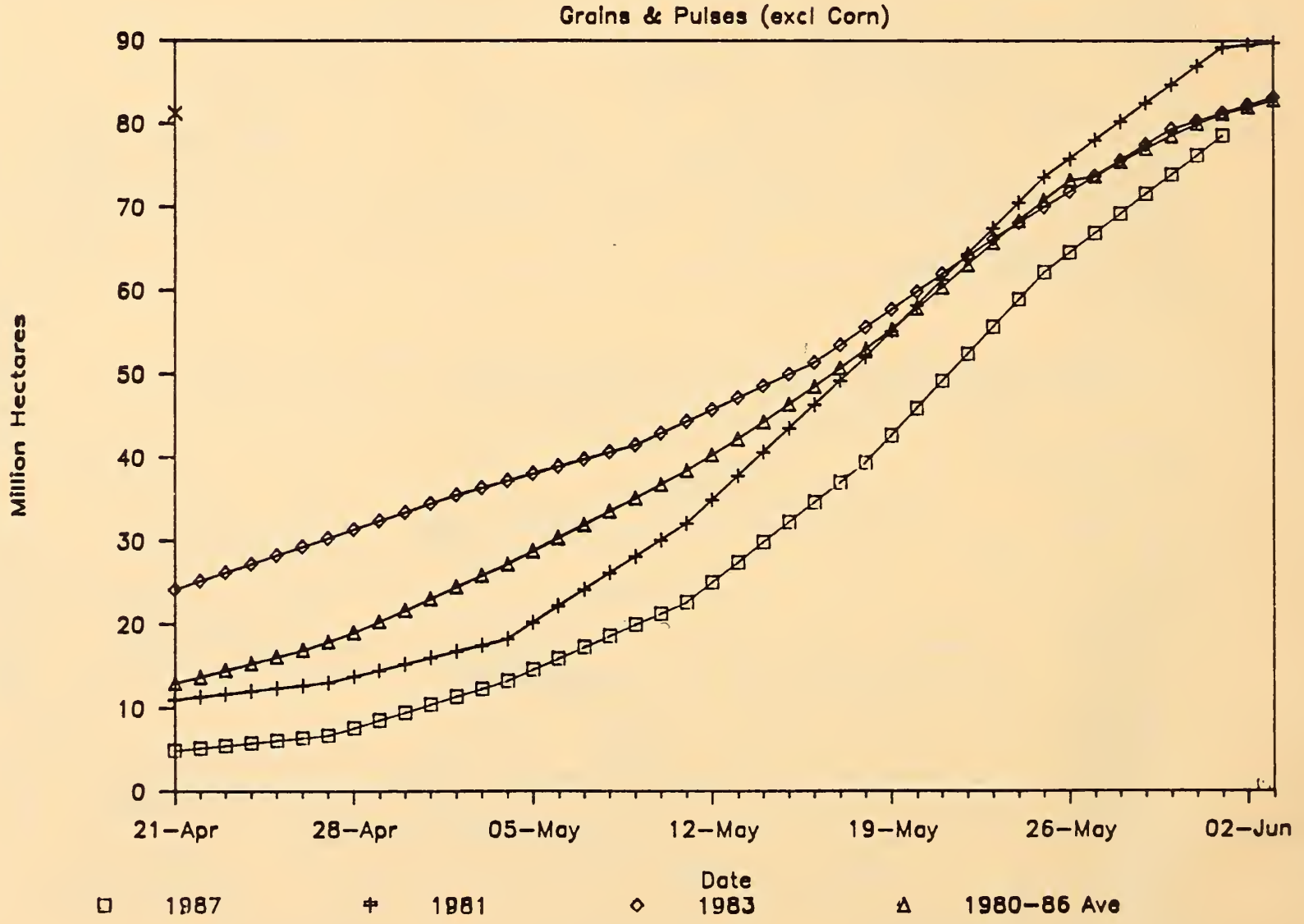

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USSR Grain Situation and Outlook

Circular Series

SG 5-87
May 1987

JUL 17 '87

The initial USDA forecast of the 1987 Soviet grain crop is 195 million tons, 15 million tons below the 1986 crop. The estimate includes 75 million tons of wheat, 106 million coarse grains and 14 million miscellaneous grains and pulses. Total grain area is estimated at 116.3 million hectares, marginally below 1986's area of 116.5 million hectares. The area estimates are 46 million hectares of wheat, 60.6 million of coarse grains and 9.7 million of miscellaneous grains and pulses. The winter grain production estimate is down from 1986 by 17 million tons because of a drought related shortfall in seeded area last fall, above average area lost to winterkill and lower estimated yields. Spring grain production is forecast to increase slightly this year because of an expected increase in planted area by about 5 percent.

Projections of 1987/88 Soviet crop production are highly tentative. These early-season assessments will be modified as the season progresses by both positive and negative factors, including weather developments.

RECENT WEATHER AND CROP DEVELOPMENTS

Above-normal April precipitation continued to increase moisture reserves in the eastern Ukraine, southern Ukraine, North Caucasus, and parts of the lower Volga. Precipitation continued below-normal in parts of the western Ukraine and Central Region. April temperatures continued much below normal (4 to 6 degrees C) in the major grain producing areas of the eastern Ukraine, Black Soils Region, Volga, and the North Caucasus. In fact, heavy snow fell over the eastern Ukraine and northern North Caucasus on April 12 and 13, resulting in a deep snow cover about 6 weeks later than usual. The persistent cold, wet weather during April caused significant spring planting delays. In addition, winter grains broke dormancy in the south about 2 to 3 weeks later than usual. By the end of April, snow cover gradually disappeared from Soviet crop areas.

In most spring grain areas east of the Urals, spring crop planting normally begins around mid-May. Above normal winter precipitation, and an unseasonably cold, wet April likely provided good early season moisture for spring crops.

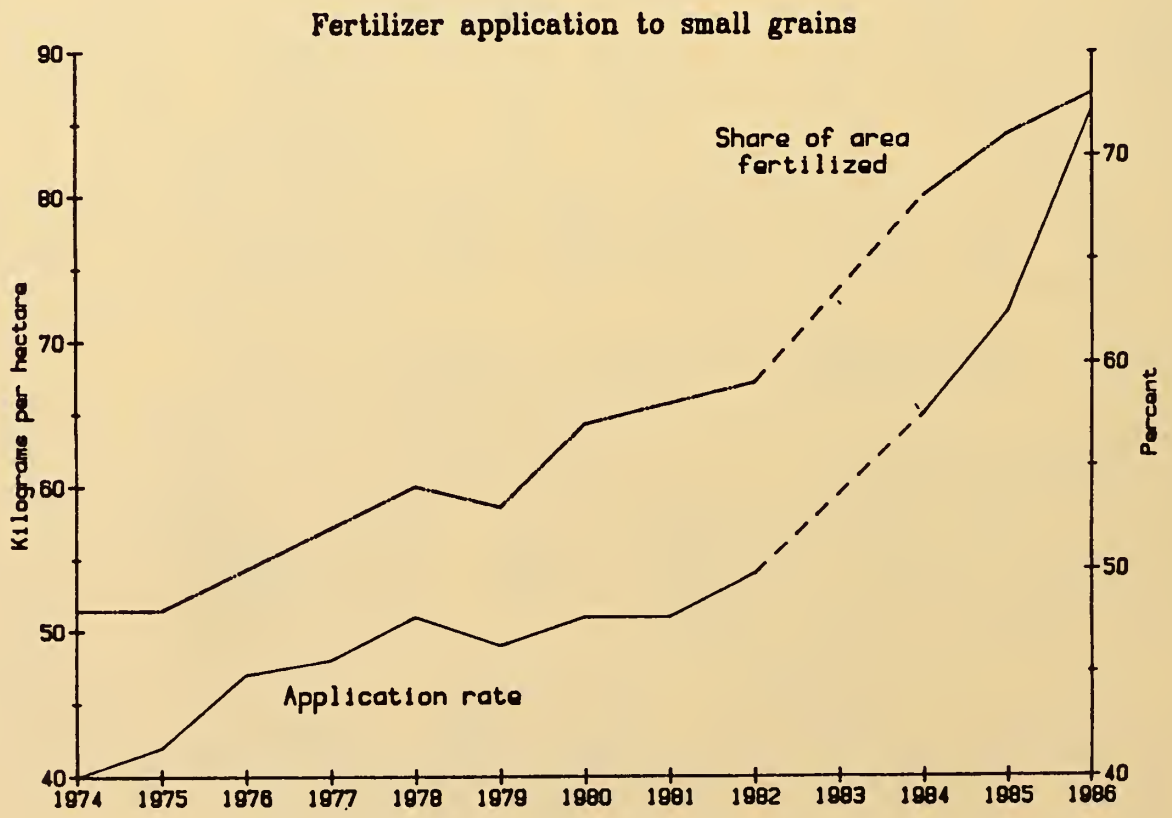
On April 30, the persistent cold, wet weather pattern over Soviet crop areas was replaced by rapid warming and mostly dry weather which continued through May 7. Winter crops greened as far north as the Baltic States, Belorussia, the Black Soils Region, and parts of the Central Region, about 2 to 3 weeks later than usual. The warm, dry weather in the southern European USSR promoted vegetative crop growth and helped dry topsoils for spring planting. Since May 8, showers and cooler weather returned to European USSR crop areas.

Approved by the World Agricultural Outlook Board – USDA

USSR: Grain Production, 1986

	Area	Yield	Production
	Million hectares	Ha./ton	Million tons
Winter Wheat	16.632	2.80	46.528
Spring Wheat	32.096	1.43	45.778
Total	48.728	1.89	92.306
Winter Barley	1.414	2.95	4.166
Spring Barley	28.550	1.74	49.723
Total	29.964	1.80	53.889
Rye	8.741	1.76	15.248
Oats	13.173	1.66	21.929
Corn	4.223	2.95	12.479
Millet	2.485	0.95	2.368
Total Coarse Grain	58.586	1.81	105.913
Buckwheat	1.584	0.63	1.009
Rice	0.621	4.24	2.633
Pulses	6.723	1.17	7.900
Miscellaneous	0.235	1.31	0.307
Total Miscellaneous	9.163	1.29	11.849
Winter Grains	26.787	2.46	65.942
Springs Grains	89.690	1.61	144.126
Total	116.477	1.80	210.068

Source: Vestnik Statistiki (No. 4, 1987)



SPRING GRAIN SEEDING GETS LATE START

As of May 4, only 13.3 million hectares were seeded with small grains and pulses. This puts early spring sowing about 2 weeks behind the 1980-86 average and reflects the slowest seeding pace in at least 15 years. By May 4, an average of about 27 million hectares are normally planted.

1986 FERTILIZER USE HIGHEST EVER

In line with measures called for by the intensive technology program, a reported record 73 percent of all small grain area received fertilizer application in 1986, up 28 percent from 1980, according to Vestnik Statistiki (No. 4 1987). On small grain area fertilized, the application rate reached 86 kilograms/hectare in 1986, up nearly 20 percent from 1985, and 75 percent above the 1976-80 average. Fertilizer supplies appear to be increasing in 1987. For the first quarter of 1987 production of mineral fertilizers (9 million tons) and pesticides (87,600 tons) were up 3 and 2 percent respectively compared with the same period last year, as reported in Pravda (24 April 1987). Deliveries of mineral fertilizers to farms during January-March 1987 totaled 7 million tons, 7 percent more than in the first quarter of 1986.

FINAL 1986 GRAIN AREA DATA RELEASED

Final 1986 grain area by grain type and Republic were published in Vestnik Statistiki (No. 4, 1987) along with production and yield data. Total Soviet grain area was 116.48 million hectares, down about 1.5 million hectares from 1985, and the lowest area since 1960. Total wheat area fell by 1.5 million hectares to 48.7 million, the lowest wheat area since at least 1955. Clean summer fallow area increased almost 500,000 hectares to 21.7 million and roughage crop area rose 1.6 million hectares to 71.4 million in 1986.

GRAIN SUPPLIES PROJECTED TO DECLINE

USSR grain supplies for the 1987/88 marketing year are expected to be down modestly from the year earlier level as a harsh winter and late planting season have reduced prospects for the 1987 grain crop. Imports are forecast to continue heavy, totaling 36 million tons up 6 million from the 1986/87 level. This marks the eighth consecutive year that imports have approached or exceeded 30 million tons. Domestic grain utilization is projected at 228 million tons basically unchanged from the 1986/87 level. Feed requirements increased sharply in 1986/87 as a result of the cold winter and late spring. These conditions are not expected to be repeated in 1987/88, however, growth in livestock inventories and planned increases in livestock output will act to maintain grain feeding in the coming year. Grain supplies in 1987/88 are again expected to exceed utilization, permitting a small build up in USSR grain stocks.

GRAIN IMPORTS EXPECTED TO CONTINUE HEAVY

The USSR is again expected to turn heavily to the international grain market with 1987/88 imports currently projected at 36 million tons. So far there appears to have been only modest USSR grain purchases for delivery in the July 1987-forward shipping period as the bulk of the recent buying has been for delivery during the late stages of the 1986/87 marketing year. Imports in 1987/88 are expected to consist of 21 million tons of wheat, 14 million coarse grains and the balance rice, miscellaneous grains and pulses.

Grain trading agreements are expected to continue to play an important role in USSR import decisions in the year ahead as they currently have agreements covering annual trade of around 20 million tons.

The 1987 wheat crop is projected to total only 75 million tons, the smallest since 1984/85. Consequently, wheat imports in 1987/88 are expected to climb to 21 million tons, the highest level since 1984/85 when wheat imports were record large. Imports of quality bread wheats will again account for the bulk of Soviet wheat imports, although aggressive marketing by the major competitors will likely result in continued significant feed wheat imports.

Over the last 2 years, the United States has supplied little of the USSR's wheat import needs, however, this is likely to change in 1987/88 as a result of the recent U.S. offer of an Export Enhancement Program for wheat to the USSR. The USSR has already purchased U.S. wheat for delivery during the early summer. A total of 4 million tons is expected to be sold and shipped over the next few months.

The USSR is projected to harvest another relatively large coarse grain crop in 1987/88. Consequently, coarse grain imports for 1987/88 are projected to total 14 million tons, up fractionally from the level of the previous 2 seasons but still far short of the 1984/85 record. The USSR's continued emphasis on increasing meat supplies, along with low world coarse grain prices, bodes well for 1987/88 coarse grain imports.

1986/87 IMPORT ESTIMATE INCREASED AGAIN

Canadian grain sales to the USSR appear to be headed towards a record 10 million tons. The Soviets have also been actively lifting grains from the EC and the United States. Reflecting this late season flurry of activity, the 1986/87 import estimate has been increased to 30 million tons with both the wheat and coarse grain import estimates increased by one million to 16 million and 13 million, respectively. The estimate of grain used for feed has also been increased by a million tons to a record 130 million. This past winter's extreme cold weather, and late spring are expected to have increased pressure on feed supplies and may well be contributing to the recent pick-up in USSR grain purchases. The estimate of ending stocks has also been increased.

U.S. AGAIN OFFERS USSR WHEAT EEP

On April 30, the U.S. announced an Export Enhancement Program which would provide the opportunity for sales of 4 million tons of U.S. wheat to the Soviet Union. The sales of wheat will be made at competitively world prices. The last U.S. wheat sale to the USSR was in June 1985. By May 8, the USSR had already purchased 950,000 tons of U.S. wheat under this program.

Prepared by the USDA Inter-Agency Task Force on the USSR Grain Situation.

USSR Grain Area, Yield, and Production
1975-1986, and 1987 (Forecast)

Grain	Area (Million Hectares)	Yield (Metric Tons) (Per Hectare)	Production 1/ (Million) (Metric Tons)
Wheat			
1975	62.0	1.07	66.2
1976	59.5	1.63	96.9
1977	62.0	1.49	92.2
1978	62.9	1.92	120.9
1979	57.7	1.56	90.2
1980	61.5	1.60	98.2
1981	59.2	1.37	81.1
1982	57.3	1.47	84.3
1983	50.8	1.52	77.5
1984	51.1	1.34	68.6
1985	50.3	1.55	78.1
1986	48.7	1.89	92.3
1987 (Forecast)	46.0	1.63	75.0
Coarse Grains 2/			
1975	58.1	1.13	65.8
1976	60.9	1.89	115.0
1977	60.6	1.53	92.6
1978	58.0	1.82	105.4
1979	61.2	1.33	81.2
1980	57.9	1.39	80.5
1981	58.0	1.19	69.3
1982	58.0	1.58	91.8
1983	61.2	1.67	101.9
1984	59.2	1.53	90.5
1985	58.5	1.71	100.0
1986	58.6	1.81	105.9
1987 (Forecast)	60.6	1.75	106.0
Total Grain 3/			
1975	127.9	1.10	140.1
1976	127.8	1.75	223.8
1977	130.3	1.50	195.7
1978	128.5	1.85	237.4
1979	126.4	1.42	179.2
1980	126.6	1.49	189.1
1981	125.6	1.26	158.2
1982	123.0	1.52	186.8
1983	120.8	1.59	192.2
1984	119.6	1.44	172.6
1985	117.9	1.62	191.7
1986	116.5	1.80	210.1
1987 (Forecast)	116.3	1.68	195.0

1/ "Bunker weight" basis; not discounted for excess moisture or foreign material.
2/ Includes rye, barley, oats, corn, sorghum, and millet.
3/ Includes wheat, coarse grains, pulses, rice, buckwheat, and miscellaneous grains.

USSR: Total Grain, Wheat, and Coarse Grains: Supply/Utilization 1975/76-1986/87

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Projected 1987/88	75	21.0	1.0	95	93	11	1	36	8	37	+2
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United States Department of Agriculture

Foreign Agricultural Service

Circular Series

SG 4-87
April 1987

USSR Grain Situation and Outlook

Recent Weather and Crop Developments

Above-normal March precipitation, mainly snow, covered winter grain in Belorussia, the western and eastern Ukraine, southern Black Soils, North Caucasus, and the lower Volga. Below-normal precipitation covered remaining winter grain areas. In early March, extreme cold returned to the European USSR. Monthly average temperatures were 4 to 6 degrees C below normal in major southern winter wheat areas and 2 to 4 degrees C below normal in the north. By month's end, gradual warming occurred over the European USSR, slowly melting snow.

Since April 1, gradual warming continued over Soviet winter grain areas, accompanied by light rain. As of April 6, the southern boundary of snow cover extended eastward through the central Ukraine, central North Caucasus, and the lower Volga, about 1 month later than usual. Also, winter grains in the south remained dormant about 2 to 3 weeks later than normal. However, warm weather in crop areas adjacent to the Black Sea coast promoted crop greening.

Cold weather and persistent, heavy snowcover are causing a delayed start of spring fieldwork in the European USSR. This follows an abnormally dry autumn and a severe winter which is believed to have resulted in above-average winterkill. Time, therefore, has become a crucial element in the European USSR, where the bulk of the winter grains and a significant part of the spring grains are grown. Soil moisture conditions are favorable in all major grain growing regions of the USSR.

Import Estimate Increased Again

The estimate of USSR grain imports for the 1986/87 marketing year has been increased by 2 million tons to 28 million. This is down only slightly from the year earlier level of nearly 30 million, even though the reported 1986 crop of 210 million tons is 18 million above the 1985 harvest and the fourth highest on record. The estimate of 1986/87 wheat imports continues at 15 million tons, while the estimate of coarse grain imports has been increased 2 million to 12 million. Miscellaneous grains, rice, and pulse imports are expected to account for the balance.

Total USSR grain purchases from all origins for delivery in 1986/87 are currently estimated at over 25 million tons, including 14 million tons of wheat and nearly 12 million tons of coarse grains. This past month, USSR grain buyers added to earlier purchases of U.S. corn while apparently finalizing details of the early summer wheat and barley export program from Canada.

Approved by the World Agricultural Outlook Board – USDA

Domestic Use Estimate Holds

The larger supplies appear to be supporting both an increase in domestic utilization as well as a significant addition to stocks in 1986/87. Grain used for feed is currently estimated at a record 129 million tons. Livestock inventories are at record or near record levels. In addition, there have been extended periods of extremely cold weather this winter so feed demand has undoubtedly been quite high. Harvesting weather for the 1986 crop would have suggested a relatively small allowance for dockage and waste. However, the shear magnitude of the 1986 crop may have contributed to increased post harvest losses. In addition, pressures on Soviet grain producers to show high field yields this year may have resulted in more dockage in the crop than normal. With total grain supplies exceeding utilization, the USSR is expected to add another 9 million tons to grain stocks this year.

Another Jump in Livestock Production

Livestock production on state and collective farms recorded a significant increase over last year's pace in February. Meat production in February was nearly 10 percent larger than the amount produced in February 1986. For the January-February period 1987, meat production on state and collective farms this year is 5 percent larger than in 1986, milk production is nearly 7 percent larger and egg production is 1.5 percent larger. All of the increase in milk production is accounted for by higher yields. Though improved animal productivity is probably an important factor behind the increased livestock production, monthly inventory numbers do indicate a slightly higher than normal hog slaughter during February. In comparison with previous years, inventories as of March 1 remained record large for cattle and hogs. Inventories of cows and poultry were slightly below year earlier amounts.

USSR: Livestock Production on State and Collective Farms
January-February, Cumulative, 1983-87

	1983	1984	1985	1986	1987
			--Thousand Tons--		
Meat, liveweight	2,655	2,870	3,080	3,486	3,665
Milk	7,985	8,626	8,509	9,272	9,886
Eggs, million pieces	8,290	8,678	8,796	9,436	9,580

USSR: Livestock Inventories on State and Collective Farms
March 1, 1982-1987

Inventories	1982	1983	1984	1985	1986	1987
			--Thousand Head--			
Total cattle	90.6	91.6	94.0	95.2	94.7	96.1
of which cows	29.7	29.6	29.6	29.5	29.0	28.9
Hogs	54.1	56.8	58.9	58.5	59.1	60.3
Sheep & goats	124.0	123.0	125.6	122.4	121.4	123.4
Poultry	669.8	704.0	721.0	734.0	752.6	751.6

Prepared by the USDA Inter-Agency Task Force on the USSR Grain Situation.

USSR Grain Area, Yield, and Production
1975-1985, and 1986 (Preliminary)

Grain	Area (Million Hectares)	Yield (Metric Tons) (Per Hectare)	Production 1/ (Million) (Metric Tons)
Wheat			
1975	62.0	1.07	66.2
1976	59.5	1.63	96.9
1977	62.0	1.49	92.2
1978	62.9	1.92	120.9
1979	57.7	1.56	90.2
1980	61.5	1.60	98.2
1981	59.2	1.37	81.1
1982	57.3	1.47	84.3
1983	50.8	1.52	77.5
1984	51.1	1.34	68.6
1985	50.3	1.55	78.1
1986 (Preliminary)	48.7	1.90	92.3
Coarse Grains 2/			
1975	58.1	1.13	65.8
1976	60.9	1.89	115.0
1977	60.6	1.53	92.6
1978	58.0	1.82	105.4
1979	61.2	1.33	81.2
1980	57.9	1.39	80.5
1981	58.0	1.19	69.3
1982	58.0	1.58	91.8
1983	61.2	1.67	101.9
1984	59.2	1.53	90.5
1985	58.5	1.71	100.0
1986 (Preliminary)	58.3	1.77	103.3
Total Grain 3/			
1975	127.9	1.10	140.1
1976	127.8	1.75	223.8
1977	130.3	1.50	195.7
1978	128.5	1.85	237.4
1979	126.4	1.42	179.2
1980	126.6	1.49	189.1
1981	125.6	1.26	158.2
1982	123.0	1.52	186.8
1983	120.8	1.59	192.2
1984	119.6	1.44	172.6
1985	117.9	1.62	191.7
1986 (Preliminary)	116.5	1.80	210.1

1/ "Bunker weight" basis; not discounted for excess moisture or foreign material.
2/ Includes rye, barley, oats, corn, sorghum, and millet.
3/ Includes wheat, coarse grains, pulses, rice, buckwheat, and miscellaneous grains.

USSR: Total Grain, Wheat, and Coarse Grains: Supply/Utilization 1975/76-1986/87

Year	Production	Trade (Jul/Jun) Imports	Trade (Jul/Jun) Exports	Availability 1/ July/June	Total 1/	Seed	Industrial	Food	Dockage/ Waste 2/	Feed	Stock Change 3/ July/June
				(Million Metric Tons)							
					Total Grains 4/						
1975/76	140	26.1	0.7	166	178	25	5	45	14	89	-12
1976/77	224	11.0	3.3	232	220	26	5	45	31	113	+12
1977/78	196	18.9	2.3	213	229	26	5	45	29	124	-16
1978/79	237	15.6	2.8	250	230	25	6	46	28	125	+20
1979/80	179	31.0	0.8	209	223	26	6	46	22	123	-14
1980/81 5/	189	34.8	0.5	223	224	25	6	46	28	119	-1
1981/82 5/	158	47.3	0.5	205	211	25	5	47	16	118	-6
1982/83 5/	187	34.3	0.5	221	213	25	5	47	18	118	+8
1983/84 5/	192	32.5	0.5	224	218	26	5	47	21	120	+6
1984/85 5/	173	55.5	0.5	228	219	24	6	47	19	123	+9
1985/86 5/	192	29.9	0.5	221	218	24	5	47	18	124	+4
Projected 1986/87	210	28.0	1.0	237	228	24	5	47	23	129	+9
					Wheat						
1975/76	66	10.1	0.5	76	86	13	1	35	7	30	-10
1976/77	97	4.6	1.0	100	92	13	2	35	14	28	+8
1977/78	92	6.6	1.0	98	109	14	2	35	14	44	-11
1978/79	121	5.1	1.5	125	107	13	2	35	14	43	+18
1979/80	90	12.0	0.5	102	114	13	2	35	11	53	-12
1980/81 5/	98	16.0	0.5	114	113	13	2	35	15	48	+1
1981/82 5/	81	20.3	0.5	101	104	11	2	36	8	47	-3
1982/83 5/	84	20.8	0.5	105	101	11	2	36	8	44	+4
1983/84 5/	78	20.5	0.5	98	93	11	2	36	9	35	+4
1984/85 5/	69	28.1	0.5	96	91	11	2	36	8	35	+5
1985/86 5/	78	15.7	0.5	93	92	11	1	36	8	36	+2
Projected 1986/87	92	15.0	1.0	106	100	11	1	36	10	42	+6
					Coarse Grains						
1975/76	66	15.6	--	81	83	11	4	7	6	56	-2
1976/77	115	5.7	2.0	119	115	11	3	7	16	78	+4
1977/78	93	11.7	1.0	103	108	10	3	7	14	74	-5
1978/79	105	10.0	1.0	114	112	10	4	7	13	79	+2
1979/80	81	18.4	--	100	102	12	4	7	10	68	-2
1980/81 5/	81	18.0	--	99	101	12	4	7	12	66	-2
1981/82 5/	69	26.0	--	95	98	13	3	7	7	68	-3
1982/83 5/	92	12.5	--	104	101	13	3	7	9	69	+4
1983/84 5/	102	11.5	--	113	112	13	3	7	11	78	+2
1984/85 5/	90	26.9	--	117	114	12	4	7	10	81	+4
1985/86 5/	100	13.7	--	114	112	12	4	7	9	80	+2
Projected 1986/87	103	12.0	--	115	112	12	4	7	11	78	+3

1/ Availability excludes beginning stocks. Totals may not add due to rounding.
2/ Includes post harvest losses incurred in transport and storage.
3/ Minus indicates withdrawal from stocks.
4/ Total grain production, trade, and utilization figures include pulses, paddy rice, buckwheat, and miscellaneous grains in addition to wheat and coarse grains.
5/ Preliminary for trade, availability, utilization, and stocks change.

USSR Total Grain Imports 1/
By Country of Origin by months
In 1,000 Metric Tons

	U.S.	Canada	Australia	EC	Argentina	Sub Total	Total 2/
July 1984	259	1,481	58	59	286	2,143	
August	1,231	1,408	115	444	330	3,528	
September	2,172	1,254	132	943	293	4,794	
July-Sept	3,662	4,143	305	1,446	909	10,465	11,300
October	2,320	809	152	966	302	4,549	
November	3,014	961	244	840	99	5,158	
December	3,535	96	100	512	230	4,473	
Oct-Dec	8,869	1,866	496	2,318	631	14,180	14,800
January 1985	2,218	98	154	599	1,082	4,151	
February	2,196	---	215	572	1,248	4,231	
March	2,023	17	667	934	926	4,567	
Jan-March	6,437	115	1,036	2,105	3,256	12,949	14,000
April	2,016	388	716	930	1,225	5,275	
May	1,566	1,237	468	921	1,368	5,560	
June	106	481	211	1,116	580	2,494	
April-June	3,688	2,106	1,395	2,967	3,173	13,329	14,700
July	8	---	25	208	443	684	
August	---	---	---	152	281	433	
September	---	1,384	---	75	59	1,518	
July-Sept	8	1,384	25	435	783	2,635	3,600
October	411	1,057	89	200	316	2,073	
November	2,487	900	212	485	423	4,507	
December	1,337	750	101	1,155	57	3,400	
Oct-Dec	4,235	2,707	402	1,840	796	9,980	11,400
January 1986	980	171	450	1,160	15	2,776	
February	956	---	494	1,080	---	2,530	
March	71	---	850	852	---	1,773	
Jan-March	2,007	171	1,794	3,092	15	7,079	7,900
April	---	---	373	487	---	860	
May	172	435	575	445	220	1,847	
June	547	646	34	582	172	1,981	
April-June	719	1,081	982	1,514	392	4,688	6,400
July	---	604	---	51 3/	---	655	
August	---	501	---	50 3/	---	551	
September	---	666	14	50 3/	---	730	
July-September	---	1,771	14	151 3/	---	1,936	2,600
October	---	1,027	211	325 3/	---	1,563	
November	--	1,264	300	640 3/	---	2,204	
December	---	1,198	129	750 3/	---	2,077	
October-December	---	3,489	640	1,715 3/	---	5,844	7,400
January 1987	---	383	200	1,000 3/	75	1,658	
February	---	207	101	900 3/	330	1,538	

1/ Based on reported exports for countries enumerated and estimates for other countries to the USSR; excludes rice, buckwheat, millet, and other miscellaneous grains and pulses. Includes grain equivalent of flour.
2/ Partially estimated including tentative estimates for countries not enumerated, or for countries from which data is not available.
3/ Preliminary
N/A Not Available

FAS, Grain and Feed Division
April 8, 1987
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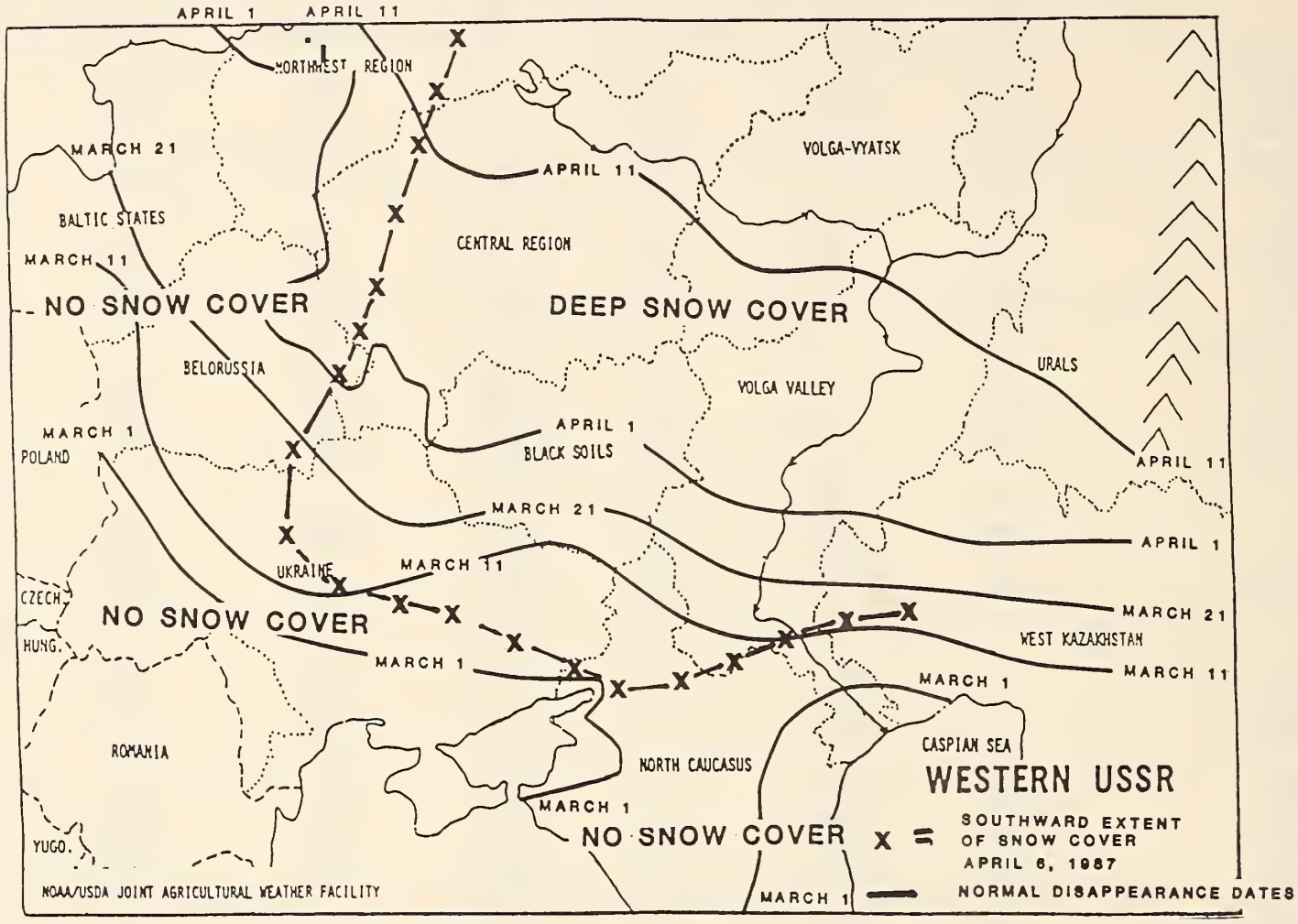
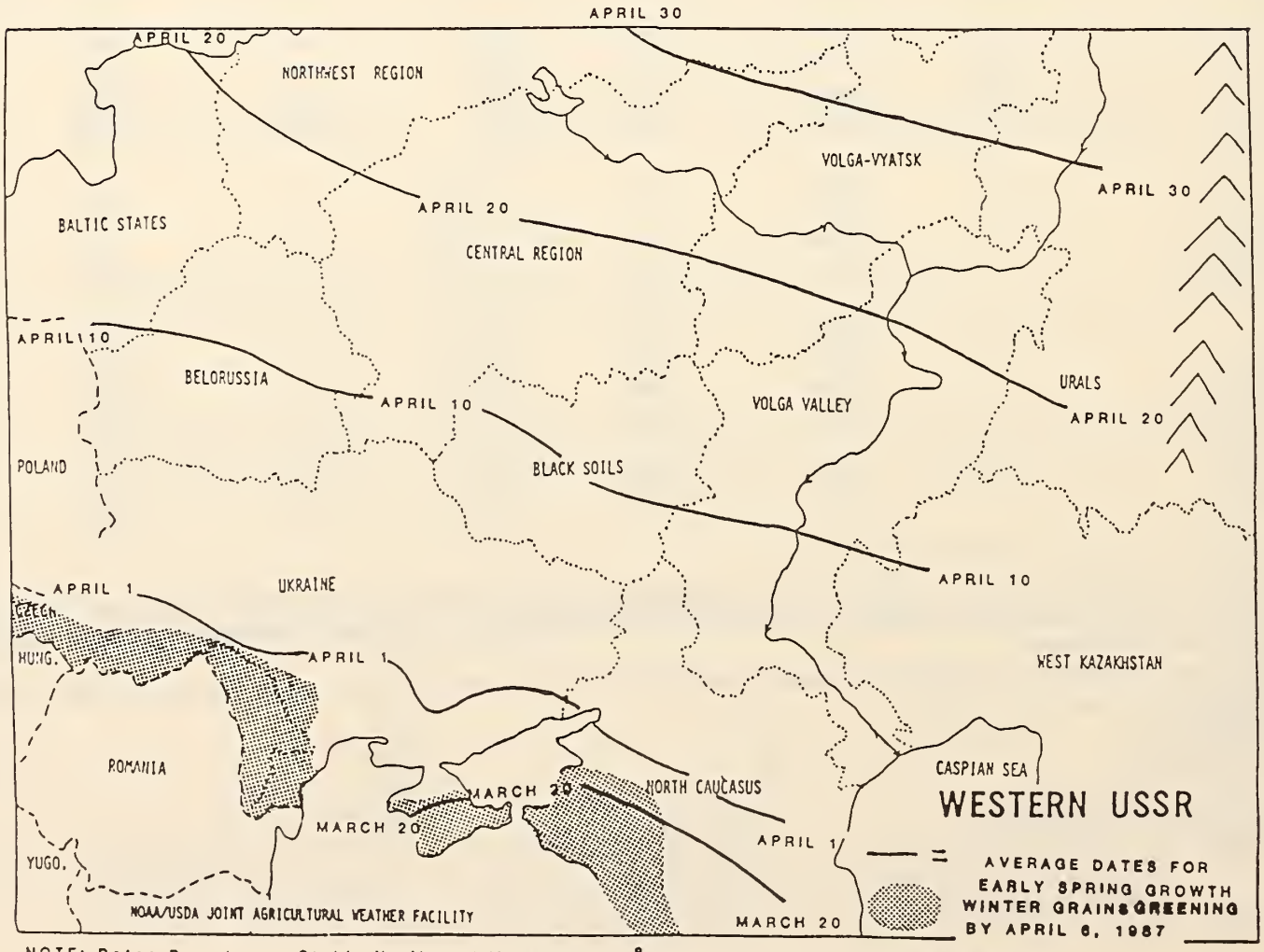
AVERAGE DATES OF DISAPPEARANCE OF SNOW COVER



AVERAGE DATES FOR EARLY SPRING GROWTH



NOTE: Dates Based on a Stable Northward Movement of 5°C Average Temp. Through the Region.

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United States
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Foreign
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Circular Series

SG 3-87
March 1987

USSR Grain Situation and Outlook

Recent Weather Developments

Precipitation during February was below normal over much of European USSR. Areas with above-normal precipitation were limited to the Baltics, northern Belorussia, and a narrow strip which stretched from the extreme eastern Ukraine through the northern North Caucasus into the central Volga. February temperatures were 1 to 2 degrees C above normal across the northern half of European USSR and 1 to 2 degrees C below normal in the south. From February 12 through 21, periods of light freezing rain and freezing drizzle occurred in the Baltic States, Belorussia, the Ukraine, and the North Caucasus, likely causing some ice-crusting.

From March 1-5, a cold wave covered winter grain areas with extreme cold (minimum temperatures around -20 degrees C), reaching as far south as the central Ukraine. Recently, temperatures moderated in these areas; however, winter grains remained dormant. In addition, heavy snow covered the eastern half of the Ukraine and the western North Caucasus.

According to an article in Izvestiya on February 5, winter crops in the Soviet Union have "perished" on about 9 million hectares because of harsh weather conditions. This statement suggests a 24 percent decrease in the estimated 37 million hectares reportedly sown to winter crops. The USDA estimates the winter grain area sown for the 1987 crop at about 33 million hectares. In recent years, average annual winterkill of winter grains has been estimated at about 17 percent.

Import Estimate Increased Again

Reflecting the return of the USSR to the U.S. corn market and continued purchases of both wheat and coarse grains from our major competitors, the 1986/87 import estimate for the USSR has been increased by 3 million tons to 26 million. Wheat imports are currently estimated at 15 million tons, up a million from a month ago and not far below a year ago's level. Sizeable imports of feed quality wheat have buoyed this year's total well above the level that might have been expected given a large 1986 crop and increased procurements of high quality wheat. Feed quality wheat imports, principally from Canada and the EC, are expected to approach 4 million tons. Feed quality wheat has been priced well below corn during much of the 1986/87 marketing year, in sharp contrast to the more traditional wheat-corn price relationship. Coarse grain imports are now expected to total 10 million tons, 2 million more than the month-earlier estimate. Most of the increase reflects recent U.S. and Argentine corn sales, although an allowance was also made for some additional Canadian and EC barley trade. The balance of the import estimate is made up of rice, pulses and miscellaneous grain.

Approved by the World Agricultural Outlook Board – USDA

Grain Purchases Climb

Total USSR grain purchases from all origins are currently estimated at around 23 million tons, including 13 million tons of wheat and over 9 million tons of coarse grains. Major purchases this past month included over 1 million tons of corn from the United States and sizeable quantities of Argentine corn and French barley. The U.S. sale marked the first corn sale since June 1986. Argentine corn sales to the USSR are now estimated at 1.5 to 2.0 million tons, while EC barley sales are approaching 1.5 million tons.

U.S. Wheat and Corn Exports to USSR

Long-Term Agreement Year	Wheat	Corn	Total
		1,000 tons	
Oct-Sept 1976/77	3,064	3,052	6,116
Oct-Sept 1977/78	3,453	11,132	14,585
Oct-Sept 1978/79	3,971	11,530	15,501
Oct-Sept 1979/80	2,171	5,768	7,939
Oct-Sept 1980/81	3,780	5,738	9,518
Oct-Sept 1981/82	6,097	7,772	13,869
Oct-Sept 1982/83	2,999	3,208	6.207
Oct-Sept 1983/84	7,593	6,476	14,069
Oct-Sept 1984/85	2,887	15,750	18,637
Oct-Sept 1985/86	153	6,808	6,961
Oct-Sept 1986/87 1/	---	1,000	1,000

1/ Officially reported sales through early March 1987

Domestic Use Estimate Increased

The estimated allowance for dockage and waste in the 1986 crop has been increased to 11 percent. USDA initially estimated dockage and waste at 9 percent of the harvest, reflecting the extremely favorable weather during the 1986 harvest and improved management of grain collection. However, in earlier years, when the crop exceeded 200 million tons, dockage and waste typically was estimated at 12 percent or more of the crop depending on that year's conditions. Based on this, the estimate of dockage and waste for the 1986 harvest has been revised to 11 percent or 23 million tons. Other domestic use items remain unchanged. Grain for feed use is estimated at a record 129 million tons. Record or near-record livestock inventories along with a dry fall which likely reduced late season pasturage and a cold winter have increased feed demand. In addition, if there is a late spring, livestock would be delayed in returning to pastures which would further increase feed requirements.

Livestock Sector Outlook

Meat and egg production in January on state and collective farms rose only slightly from the previous January's level. In contrast, milk production increased by nearly 6 percent. Unusually cold weather in January and smaller

increases in roughage supplies during 1986 than in 1985 kept livestock production from expanding as much as it did a year earlier. Inventories continue at record levels for cattle, hogs and poultry, and below previous marks for cows, and sheep and goats.

USSR: Livestock Production on State and Collective Farms
January 1983-87

	1983	1984	1985	1986	1987
			--Million tons--		
Total meat, liveweight	1,442	1,551	1,675	1,920	1,951
Milk	3,984	4,233	4,253	4,626	4,888
Eggs, million	4,269	4,478	4,569	4,892	4,895

USSR: Livestock Inventories on State and Collective Farms
February 1, 1982-87

	1982	1983	1984	1985	1986	1987
			---Million head---			
Total Cattle	90.1	90.6	92.7	94.5	94.1	95.6
of which cows	29.7	29.7	29.7	29.5	29.1	28.9
Hogs	54.8	56.6	58.6	58.6	58.9	60.7
Sheep and Goats	117.8	117.3	119.8	117.3	115.7	117.4
Poultry	651.0	687.0	703.0	722.2	740.2	745.6

Prepared by the USDA Inter-Agency Task Force on the USSR Grain Situation.

USSR Grain Area, Yield, and Production
1975-1985, and 1986 (Preliminary)

Grain	Area (Million Hectares)	Yield (Metric Tons) (Per Hectare)	Production 1/ (Million) (Metric Tons)
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1975	62.0	1.07	66.2
1976	59.5	1.63	96.9
1977	62.0	1.49	92.2
1978	62.9	1.92	120.9
1979	57.7	1.56	90.2
1980	61.5	1.60	98.2
1981	59.2	1.37	81.1
1982	57.3	1.47	84.3
1983	50.8	1.52	77.5
1984	51.1	1.34	68.6
1985	50.3	1.55	78.1
1986 (Preliminary)	48.7	1.90	92.3
Coarse Grains 2/			
1975	58.1	1.13	65.8
1976	60.9	1.89	115.0
1977	60.6	1.53	92.6
1978	58.0	1.82	105.4
1979	61.2	1.33	81.2
1980	57.9	1.39	80.5
1981	58.0	1.19	69.3
1982	58.0	1.58	91.8
1983	61.2	1.67	101.9
1984	59.2	1.53	90.5
1985	58.5	1.71	100.0
1986 (Preliminary)	58.3	1.77	103.3
Total Grain 3/			
1975	127.9	1.10	140.1
1976	127.8	1.75	223.8
1977	130.3	1.50	195.7
1978	128.5	1.85	237.4
1979	126.4	1.42	179.2
1980	126.6	1.49	189.1
1981	125.6	1.26	158.2
1982	123.0	1.52	186.8
1983	120.8	1.59	192.2
1984	119.6	1.44	172.6
1985	117.9	1.62	191.7
1986 (Preliminary)	116.5	1.80	210.1

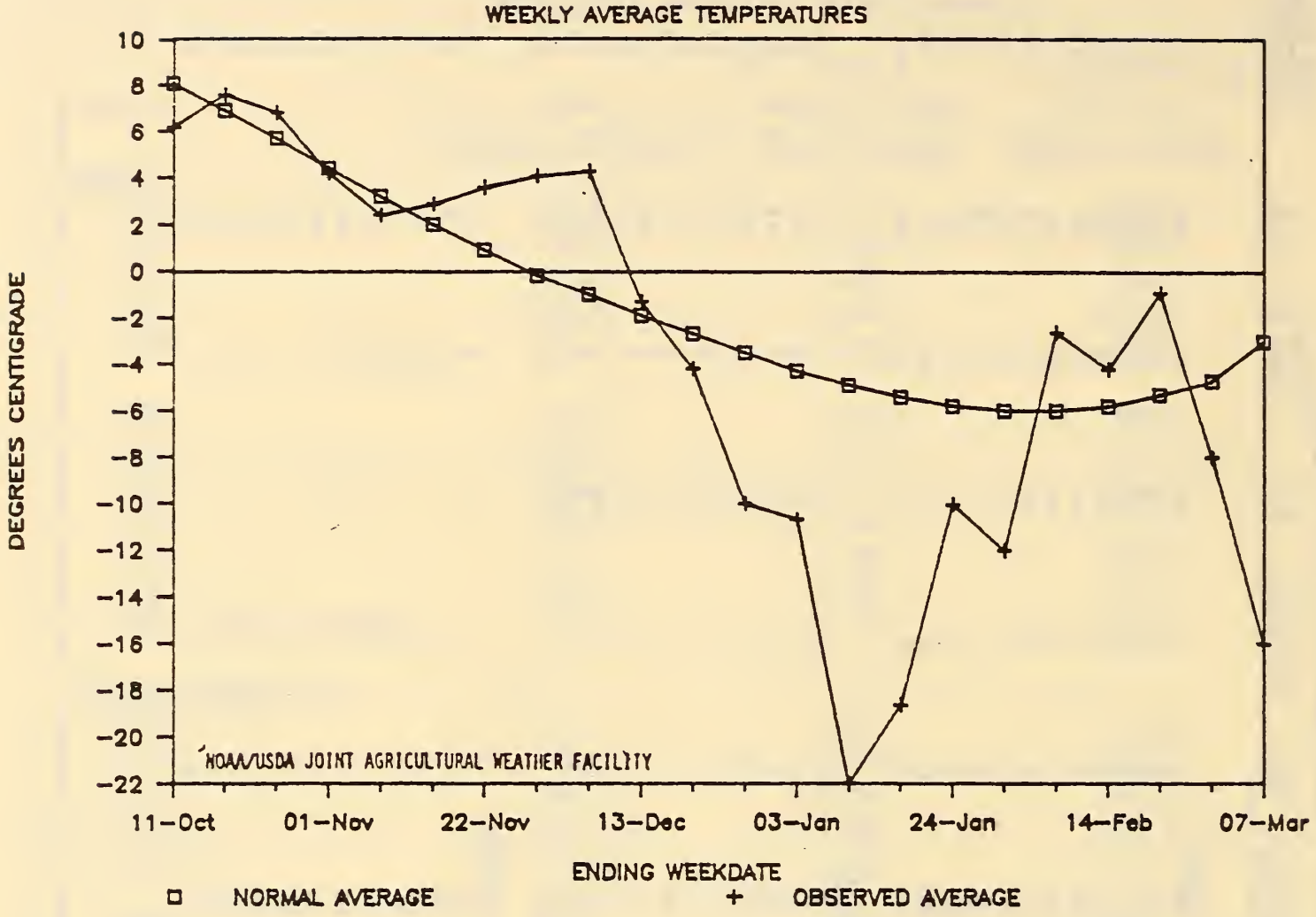
1/ "Bunker weight" basis; not discounted for excess moisture or foreign material.
2/ Includes rye, barley, oats, corn, sorghum, and millet.
3/ Includes wheat, coarse grains, pulses, rice, buckwheat, and miscellaneous grains.

USSR: Total Grain, Wheat, and Coarse Grains: Supply/Utilization 1975/76-1986/87

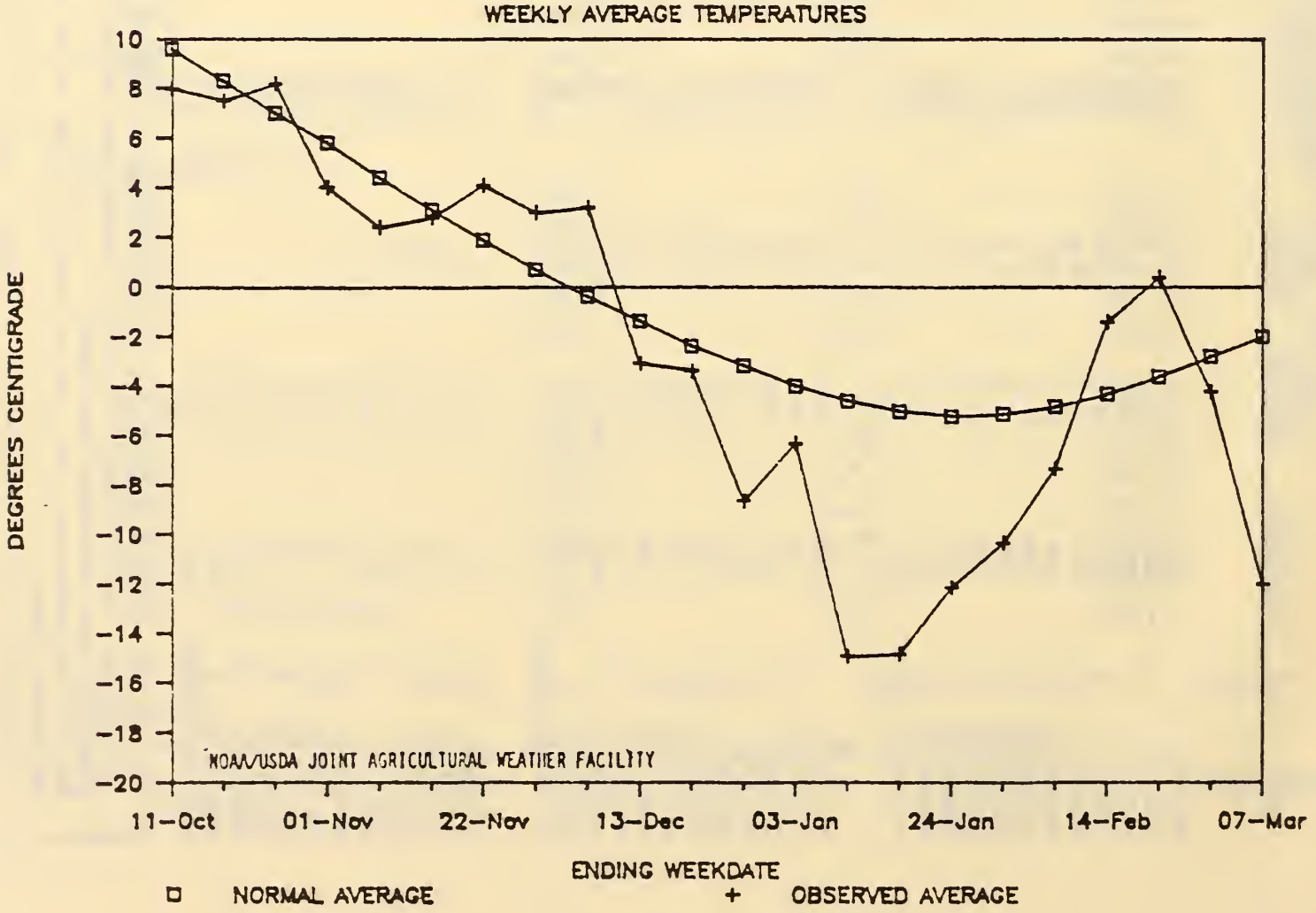
Year	Production	Trade (Jul/Jun) Imports	Trade (Jul/Jun) Exports	Availability 1/ July/June	Total 1/	Seed	Industrial	Food	Dockage/ Waste 2/	Feed	Stock Change3/ July/June
					(Million Metric Tons)						
					Total Grains 4/						
1975/76	140	26.1	0.7	166	178	25	5	45	14	89	-12
1976/77	224	11.0	3.3	232	220	26	5	45	31	113	+12
1977/78	196	18.9	2.3	213	229	26	5	45	29	124	-16
1978/79	237	15.6	2.8	250	230	25	6	46	28	125	+20
1979/80	179	31.0	0.8	209	223	26	6	46	22	123	-14
1980/81 5/	189	34.8	0.5	223	224	25	6	46	28	119	-1
1981/82 5/	158	47.3	0.5	205	211	25	5	47	16	118	-6
1982/83 5/	187	34.3	0.5	221	213	25	5	47	18	118	+8
1983/84 5/	192	32.5	0.5	224	218	26	5	47	21	120	+6
1984/85 5/	173	55.5	0.5	228	219	24	6	47	19	123	+9
1985/86 5/	192	29.9	0.5	221	218	24	5	47	18	124	+4
Projected 1986/87	210	26.0	1.0	235	228	24	5	47	23	129	+7
					Wheat						
1975/76	66	10.1	0.5	76	86	13	1	35	7	30	-10
1976/77	97	4.6	1.0	100	92	13	2	35	14	28	+8
1977/78	92	6.6	1.0	98	109	14	2	35	14	44	-11
1978/79	121	5.1	1.5	125	107	13	2	35	14	43	+18
1979/80	90	12.0	0.5	102	114	13	2	35	11	53	-12
1980/81 5/	98	16.0	0.5	114	113	13	2	35	15	48	+1
1981/82 5/	81	20.3	0.5	101	104	11	2	36	8	47	-3
1982/83 5/	84	20.8	0.5	105	101	11	2	36	8	44	+4
1983/84 5/	78	20.5	0.5	98	93	11	2	36	9	35	+4
1984/85 5/	69	28.1	0.5	96	91	11	2	36	8	35	+5
1985/86 5/	78	15.7	0.5	93	92	11	1	36	8	36	+2
Projected 1986/87	92	15.0	1.0	106	100	11	1	36	10	42	+6
					Coarse Grains						
1975/76	66	15.6	--	81	83	11	4	7	6	56	-2
1976/77	115	5.7	2.0	119	115	11	3	7	16	78	+4
1977/78	93	11.7	1.0	103	108	10	3	7	14	74	-5
1978/79	105	10.0	1.0	114	112	10	4	7	13	79	+2
1979/80	81	18.4	--	100	102	12	4	7	10	68	-2
1980/81 5/	81	18.0	--	99	101	12	4	7	12	66	-2
1981/82 5/	69	26.0	--	95	98	13	3	7	7	68	-3
1982/83 5/	92	12.5	--	104	101	13	3	7	9	69	+4
1983/84 5/	102	11.5	--	113	112	13	3	7	11	78	+2
1984/85 5/	90	26.9	--	117	114	12	4	7	10	81	+4
1985/86 5/	100	13.7	--	114	112	12	4	7	9	80	+2
Projected 1986/87	103	10.0	--	113	112	12	4	7	11	78	+1

1/ Availability excludes beginning stocks. Totals may not add due to rounding.
2/ Includes post harvest losses incurred in transport and storage.
3/ Minus indicates withdrawal from stocks.
4/ Total grain production, trade, and utilization figures include pulses, paddy rice, buckwheat, and miscellaneous grains in addition to wheat and coarse grains.
5/ Preliminary for trade, availability, utilization, and stocks change.

BALTICS AND BELORUSSIA



WESTERN UKRAINE



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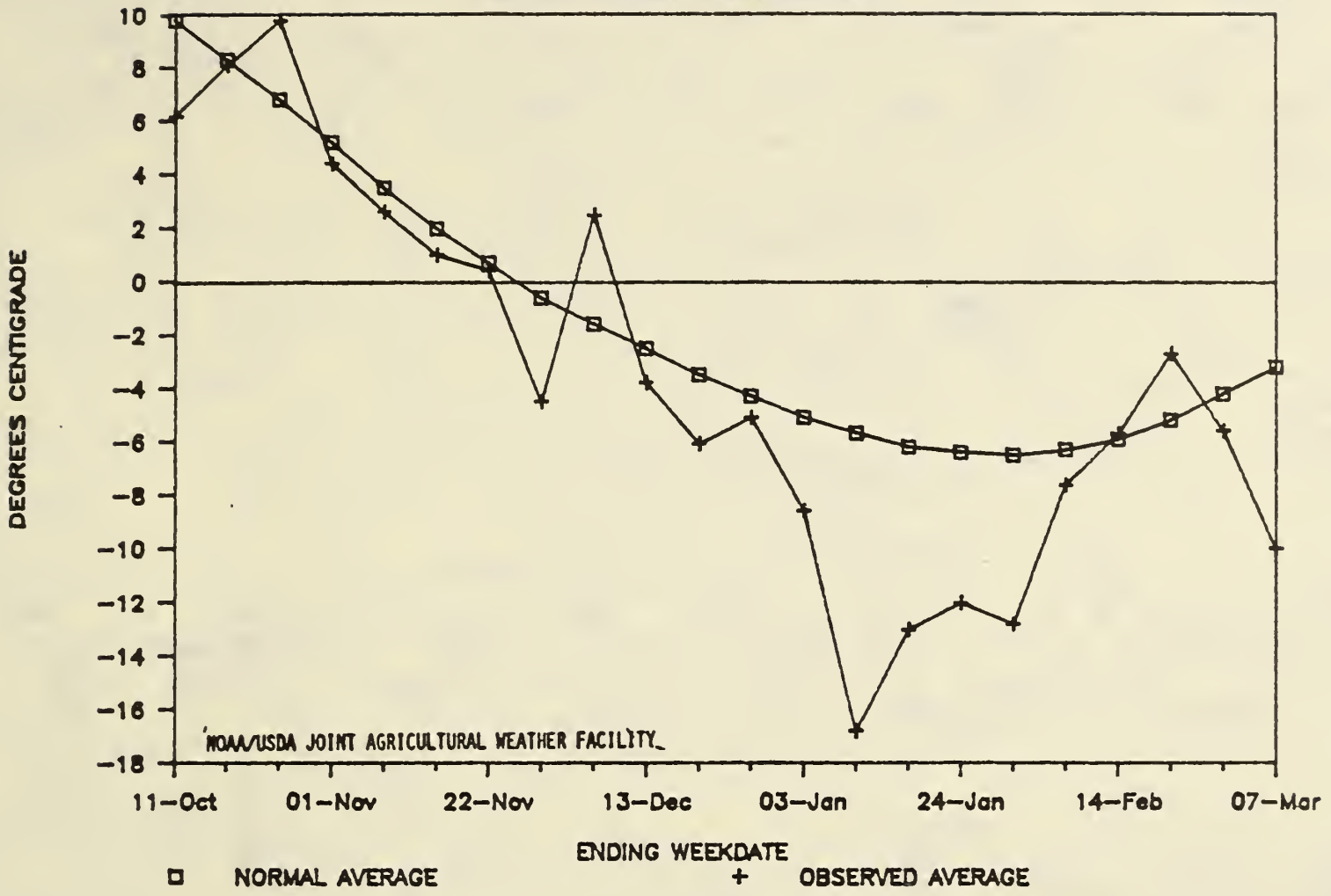

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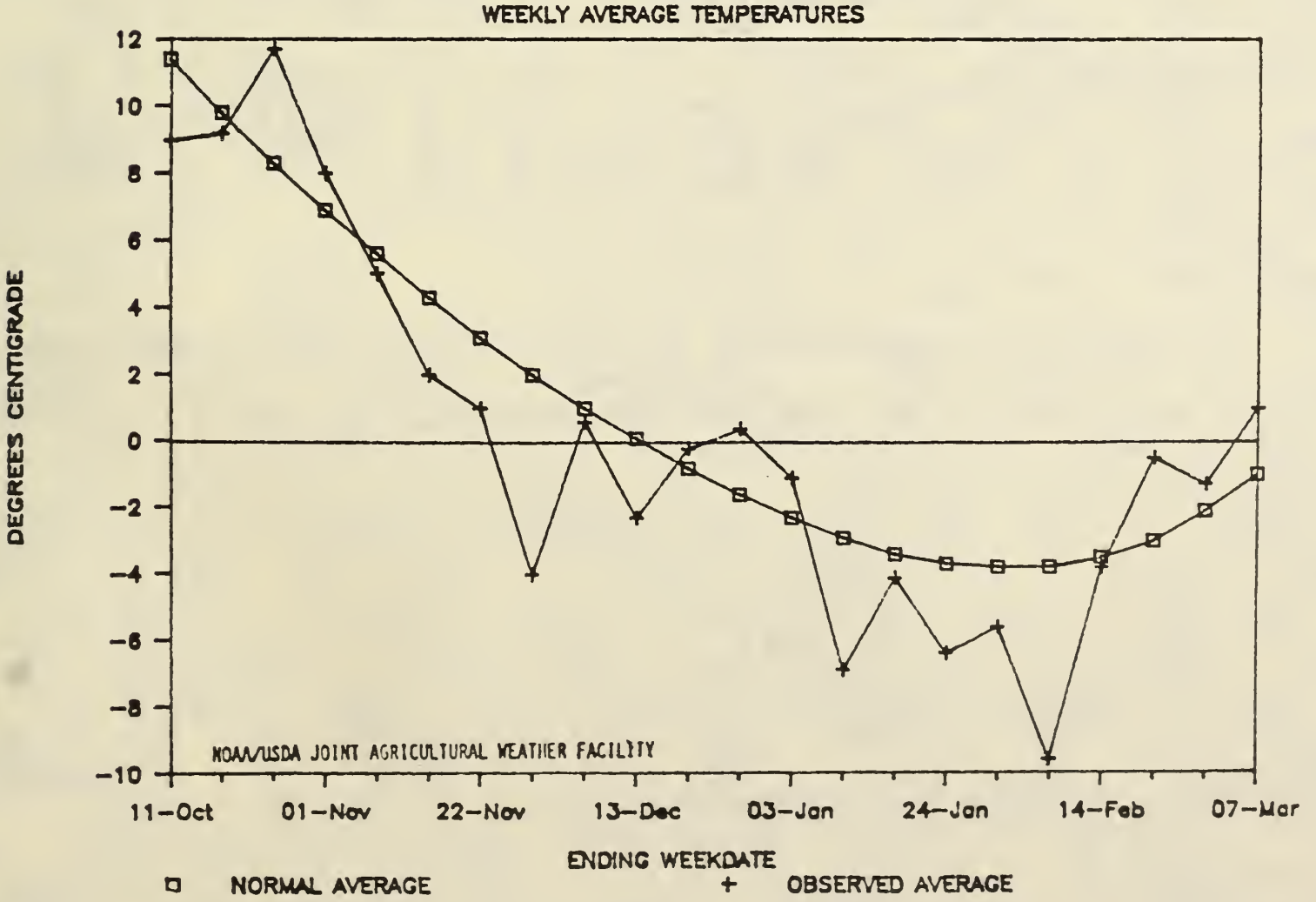

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USSR Grain Situation and Outlook

Circular Series

SG-2-87
February 9, 1987

MAR 18 '87
CURRENT SERIAL RECORDS

Recent Weather Developments

The coldest January weather in recent history (36 years) covered winter grains in the Baltic States, Belorussia, the western Ukraine, the Central Region, and the Black Soils Region. Monthly average temperatures in these areas ranged from 8 to 10 degrees C below normal. Further south, temperatures ranged from 2 to 6 degrees C below normal in the southern Ukraine and the North Caucasus. January precipitation was above to much-above normal over most winter grain areas, increasing moisture supplies for next spring's growth. Crop areas in the North Caucasus received 2 to 3 times the normal amount of January precipitation. The precipitation in the southern Ukraine and the North Caucasus occurred as rain, sleet, and snow. While averaging below normal, temperatures in the south continued December's variable pattern, likely causing some crop damage due to ice crusting and frost heaving. Frequent snow over remaining crop areas produced a deep to very deep snow cover.

Since early February, dry weather has accompanied a warming trend over most winter grain areas. Winter grain area sown for the 1987 crop is estimated at about 33 million hectares, basically unchanged from the reported area sown a year earlier at 32.8 million.

USSR Releases Crop Production Data

The Soviet Union officially reported (Plan Fullfilment Report, Pravda, January 18, 1987) its 1986 grain production figure at 210.1 million metric tons, virtually unchanged from earlier announcements. The report specified production of wheat, 92.3 million tons; corn, 12.5 million tons; and rice at 2.6 million tons. No area data was released in this report.

Wheat production has been increased by 5.3 million tons while USDA estimates of total coarse grains and miscellaneous grains were adjusted downward. USDA made no adjustments in area data for any grains.

Import Estimate Increased

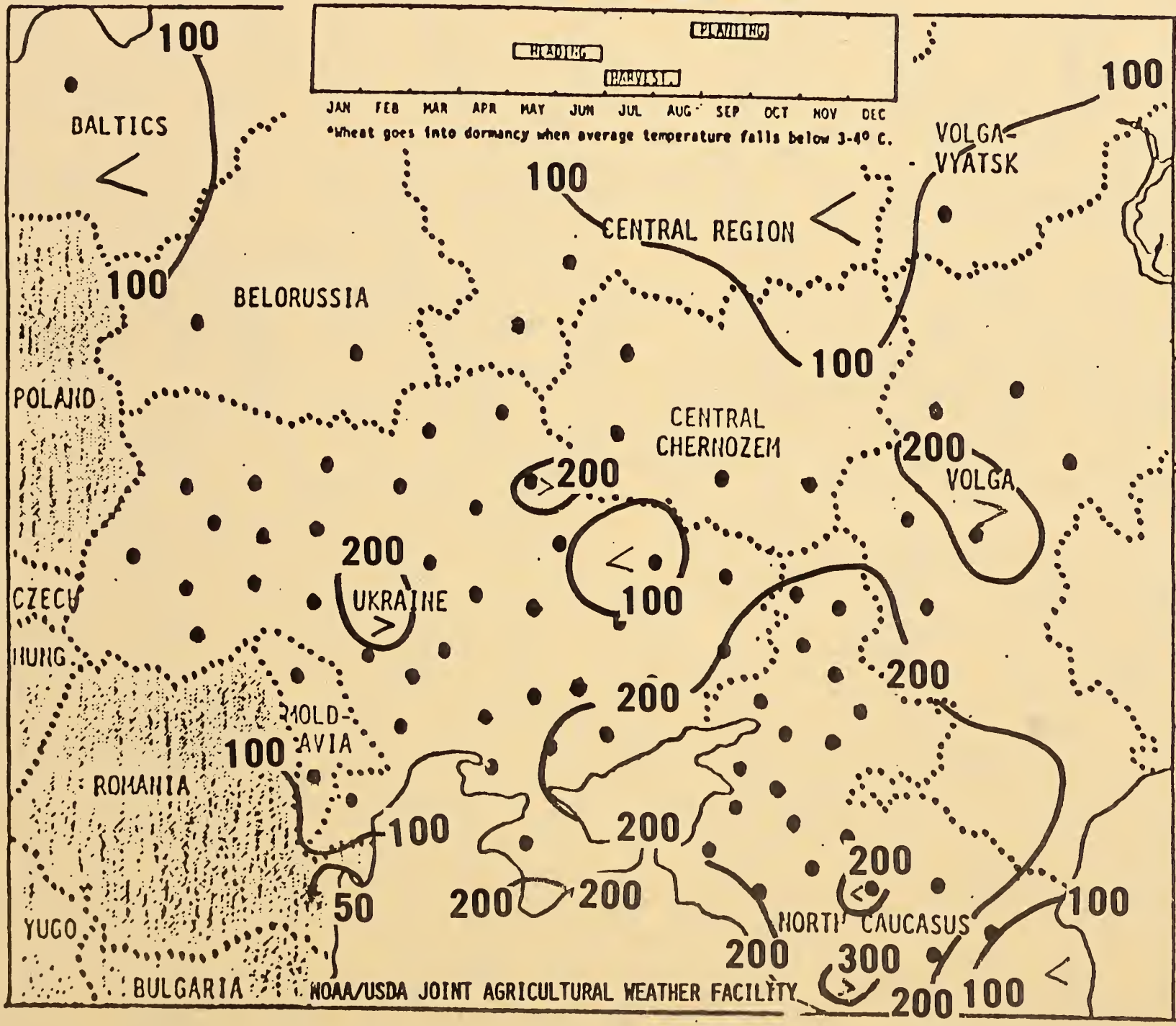
The estimate of USSR grain imports for the 1986/87 marketing year has been increased by 2 million tons to 23 million. USSR grain buyers continued to actively cover January-June import needs with recent purchases calling for delivery towards the end of this period. Total purchases from all origins are now estimated at around 20 million tons, including 13 million wheat and 7 million coarse grains.

Approved by the World Agricultural Outlook Board – USDA

81778

WINTER WHEAT CROP CALENDAR FOR MOST OF EUROPEAN USSR*

*Wheat goes into dormancy when average temperature falls below 3-4° C.



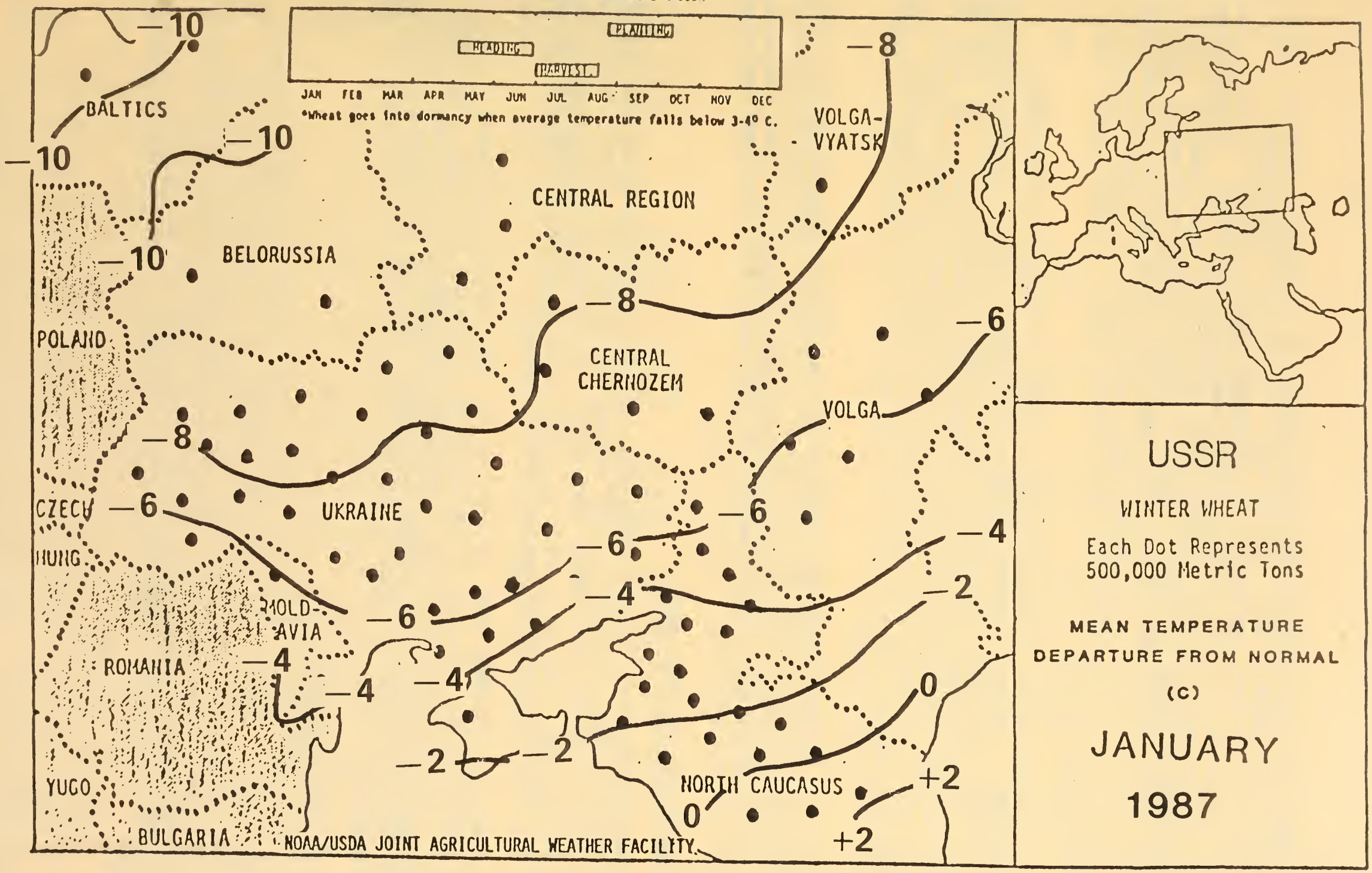
USSR

WINTER WHEAT

Each Dot Represents
500,000 Metric Tons

PERCENT OF NORMAL PRECIPITATION

JANUARY 1987


WINTER WHEAT CROP CALENDAR FOR MOST OF EUROPEAN USSR*
PLANTING
HEADING
HARVEST
JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC
*Wheat goes into dormancy when average temperature falls below 3-4° C.
BALTICS
BELORUSSIA
CENTRAL REGION
VOLGA-VYATSK
POLAND
CENTRAL CHERNOZEM
VOLGA
CZECH
UKRAINE
HUNG
MOLD-AVIA
ROMANIA
YUGO
BULGARIA
NORTH CAUCASUS
—10
—8
—6
—4
—2
0
+2
NOAA/USDA JOINT AGRICULTURAL WEATHER FACILITY
USSR
WINTER WHEAT
Each Dot Represents 500,000 Metric Tons
MEAN TEMPERATURE DEPARTURE FROM NORMAL
(C)
JANUARY
1987

The USSR has traditionally used large quantities of domestic wheat for feed, and this year appears to be turning much more to the international marketplace. Recent reports of U.K. feed wheat sales would bring total feed wheat purchases from all origins to well over 3 million tons. In many cases, feed quality wheat has been selling below corn in the export market. Soviet feed wheat purchases have had an adverse affect on sellers of coarse grain, as coarse grain imports are estimated to total only 8 million tons, the smallest since 1976/77. In contrast, wheat imports are projected to total around 14 million tons, not far below last year's level despite a significantly larger wheat harvest in 1986.

Total EC wheat sales to the USSR have climbed to above 5 million tons, including 1 - 1.5 million tons of U.K. feed wheat. For the first 6 months of the 1986/87 marketing year, Canada shipped the USSR nearly 4 million tons of wheat, including about 1.5 million of feed wheat. The shipment pace will slow over the next couple of months but for the entire year, Canadian shipments could easily hit the recent average of over 5 million tons. In contrast, wheat sales by Argentina and Australia are lagging and in the case of the United States are non-existent.

Reflecting the success of the Canadian and the EC sales programs to the USSR this year, barley is expected to account for nearly a third of the USSR's total coarse grain imports. In contrast, projected corn imports will be the smallest in over a decade with significant quantities expected to come from China and East European suppliers.

Domestic Use Estimate Rises

Reflecting the harsh winter conditions over much of the European USSR and the resultant stress on livestock, the estimate of grain moving into livestock feed has been increased to a record 129 million tons, pushing total domestic use up to 224 million. Even with this, the USSR is still expected to be able to add nearly 10 million tons to grain stocks in 1986/87.

The estimate of wheat used for feed in the USSR has been increased sharply from the month earlier estimate reflecting both the upward revision in the wheat production estimate and the continuing USSR purchases of feed wheat in the international market. Estimated coarse grain feed use was reduced to reflect the reduced coarse grain crop along with the continued slow purchases of corn overseas.

Livestock Sector Strong

The livestock sector was another bright spot in 1986 Soviet agricultural performance. Cattle, hog and poultry inventories reached all-time highs and record production of meat and eggs was achieved. Most of the increase was due to increased output per head. Despite record cattle numbers, the number of cows continued to decline, but further improvement in milk yields -- up 6 percent on state and collective farms -- allowed for the highest production to date.

USSR: Livestock Inventories on All Farms,
January 1, 1982-1987

	1982	1983	1984	1985	1986	1987
	--Million head--					
Cattle	115.9	117.2	119.6	121.0	120.9	121.9
of which cows	43.7	43.8	43.9	43.6	42.9	42.5
Hogs	73.3	76.7	78.7	77.9	77.8	80.0
Sheep and Goats	148.5	148.5	151.8	149.2	147.3	148.0
Poultry	1,067.5	1,104.5	1,126.1	1,143.0	1,165.5	N/A

N/A = not available.

USSR: Annual Livestock Production on All Farms, 1982-86

	1982	1983	1984	1985	1986
	--Million tons--				
Total meat 1/	15,368	16,449	16,985	17,131	17,700 2/
Milk	91,044	96,463	97,906	98,608	101,100 2/
Eggs, million	72,409	74,110	76,482	77,255	80,300 2/

1/ Carcass weight.
2/ Preliminary Soviet Data.
Sources: 1986 Plan Fulfillment Report and Narodnoye Khozyaistvo 1986.

Production Input Situation Remains Good

The Soviets continued in their efforts to expand the production, quality and use of inputs in line with their intensiveness program. In 1986, output of mineral fertilizers rose 5 percent, and although that of pesticides fell by 4 percent -- in line with plans -- quality of plant protectants likely rose somewhat. The production of tractors and combines was basically unchanged as called for in the annual plan, with concentration instead on reconditioning of the existing fleet.

Intensive Technology Use Expands

The intensiveness program, which includes many practices routinely performed in the West, incorporates: 1) more extensive and efficient use of quality agrochemicals (fertilizers and pesticides) and organic fertilizers, 2) reallocation and redistribution of existing input supplies, 3) use of higher yielding plant varieties, 4) utilization of more advanced and effective agricultural equipment and technologies, 5) the conduct of more scientific agronomic and soil management practices (crop rotation, increased fallow), 6) the implementation of more efficient transportation routes and schedules and, 7) increased training of agricultural specialists. Intensive technology,

which was introduced in 1984 on a number of selected test areas, was applied to 16.9 million hectares of grain in 1985. Of the total area, 6.4 million hectares was winter wheat and 10.5 million was under spring wheat. In 1986, grain area under intensive technology was almost doubled, totalling over 31 million hectares. This area was divided between winter grains (over 15.1 million hectares), spring wheat (10.9 million), millet (700,000), and fundamentally all areas planted to corn (3.9 million) and rice (600,000). It appears that corn was officially placed under intensive technology in 1986. Intensive technology is planned to cover 36 million hectares of grain in 1987, including nearly half of the winter grains. Long-term plans call for the application of intensive technology to about 50 million hectares of grain by 1990, including 20.6 million for winter grains, 17.1 for spring wheat, 4.5 for corn, 2.7 for pulses, 1.6 for millet, 600,000 for rice, 800,000 for buckwheat and other spring grains at 2.6 million.

Prepared by the USDA Inter-Agency Task Force on the USSR Grain Situation.

USSR Grain Area, Yield, and Production
1975-1985, and 1986 (Preliminary)

Grain	Area (Million Hectares)	Yield (Metric Tons) (Per Hectare)	Production 1/ (Million) (Metric Tons)
Wheat			
1975	62.0	1.07	66.2
1976	59.5	1.63	96.9
1977	62.0	1.49	92.2
1978	62.9	1.92	120.9
1979	57.7	1.56	90.2
1980	61.5	1.60	98.2
1981	59.2	1.37	81.1
1982	57.3	1.47	84.3
1983	50.8	1.52	77.5
1984	51.1	1.34	68.6
1985	50.3	1.55	78.1
1986 (Preliminary)	48.7	1.90	92.3
Coarse Grains 2/			
1975	58.1	1.13	65.8
1976	60.9	1.89	115.0
1977	60.6	1.53	92.6
1978	58.0	1.82	105.4
1979	61.2	1.33	81.2
1980	57.9	1.39	80.5
1981	58.0	1.19	69.3
1982	58.0	1.58	91.8
1983	61.2	1.67	101.9
1984	59.2	1.53	90.5
1985	58.5	1.71	100.0
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1975	127.9	1.10	140.1
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1977	130.3	1.50	195.7
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1979	126.4	1.42	179.2
1980	126.6	1.49	189.1
1981	125.6	1.26	158.2
1982	123.0	1.52	186.8
1983	120.8	1.59	192.2
1984	119.6	1.44	172.6
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USSR: Total Grain, Wheat, and Coarse Grains: Supply/Utilization 1975/76-1986/87

Year	Production	Trade (Jul/Jun) Imports	Trade (Jul/Jun) Exports	Availability 1/ July/June	Total 1/	Seed	Industrial	Food	Dockage/ Waste 2/	Feed	Stock Change 3/ July/June
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1985/86 5/	192	29.9	0.5	221	218	24	5	47	18	124	+4
Projected 1986/87	210	23.0	1.0	232	224	24	5	47	19	129	+8
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1976/77	97	4.6	1.0	100	92	13	2	35	14	28	+8
1977/78	92	6.6	1.0	98	109	14	2	35	14	44	-11
1978/79	121	5.1	1.5	125	107	13	2	35	14	43	+18
1979/80	90	12.0	0.5	102	114	13	2	35	11	53	-12
1980/81 5/	98	16.0	0.5	114	113	13	2	35	15	48	+1
1981/82 5/	81	20.3	0.5	101	104	11	2	36	8	47	-3
1982/83 5/	84	20.8	0.5	105	101	11	2	36	8	44	+4
1983/84 5/	78	20.5	0.5	98	93	11	2	36	9	35	+4
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1976/77	115	5.7	2.0	119	115	11	3	7	16	78	+4
1977/78	93	11.7	1.0	103	108	10	3	7	14	74	-5
1978/79	105	10.0	1.0	114	112	10	4	7	13	79	+2
1979/80	81	18.4	--	100	102	12	4	7	10	68	-2
1980/81 5/	81	18.0	--	99	101	12	4	7	12	66	-2
1981/82 5/	69	26.0	--	95	98	13	3	7	7	68	-3
1982/83 5/	92	12.5	--	104	101	13	3	7	9	69	+4
1983/84 5/	102	11.5	--	113	112	13	3	7	11	78	+2
1984/85 5/	90	26.9	--	117	114	12	4	7	10	81	+4
1985/86 5/	100	13.7	--	114	112	12	4	7	9	80	+2
Projected 1986/87	103	8.0	--	111	109	12	4	7	10	76	+2

1/ Availability excludes beginning stocks. Totals may not add due to rounding.
2/ Includes post harvest losses incurred in transport and storage.
3/ Minus indicates withdrawal from stocks.
4/ Total grain production, trade, and utilization figures include pulses, paddy rice, buckwheat, and miscellaneous grains in addition to wheat and coarse grains.
5/ Preliminary for trade, availability, utilization, and stocks change.

USSR Total Grain Imports 1/
By Country of Origin by months
In 1,000 Metric Tons

	U.S.	Canada	Australia	EC	Argentina	Sub Total	Total 2/
July 1984	259	1,481	58	59	286	2,143	
August	1,231	1,408	115	444	330	3,528	
September	2,172	1,254	132	943	293	4,794	
July-Sept	3,662	4,143	305	1,446	909	10,465	11,300
October	2,320	809	152	966	302	4,549	
November	3,014	961	244	840	99	5,158	
December	3,535	96	100	512	230	4,473	
Oct-Dec	8,869	1,866	496	2,318	631	14,180	14,800
January 1985	2,218	98	154	599	1,082	4,151	
February	2,196	---	215	572	1,248	4,231	
March	2,023	17	667	934	926	4,567	
Jan-March	6,437	115	1,036	2,105	3,256	12,949	14,000
April	2,016	388	716	930	1,225	5,275	
May	1,566	1,237	468	921	1,368	5,560	
June	106	481	211	1,116	580	2,494	
April-June	3,688	2,106	1,395	2,967	3,173	13,329	14,700
July	8	---	25	208	443	684	
August	---	---	---	152	281	433	
September	---	1,384	---	75	59	1,518	
July-Sept	8	1,384	25	435	783	2,635	3,600
October	411	1,057	89	200	316	2,073	
November	2,487	900	212	485	423	4,507	
December	1,337	750	101	1,155	57	3,400	
Oct-Dec	4,235	2,707	402	1,840	796	9,980	11,400
January 1986	980	171	450	1,160 3/	15	2,776	
February	956	---	494	1,080 3/	---	2,530	
March	71	---	850	852 3/	---	1,773	
Jan-March	2,007	171	1,794	3,092 3/	15	7,079	7,900
April	---	---	373	487 3/	---	860	
May	172	435	575	445 3/	220	1,847	
June	547	646	34	582 3/	172	1,981	
April-June	719	1,081	982	1,514	392	4,688	6,400
July	---	604	---	51 3/	---	655	
August	---	501	---	50 3/	---	551	
September	---	666	14	50 3/	---	730	
July-September	---	1,771	14	151 3/	---	1,936	2,600
October	---	1,027	211	325 3/	---	1,563	
November	---	1,264	300	600 3/	---	2,164	
December	---	1,198	129	800 3/	---	2,127	
October-December	---	3,489	640	1,725 3/	---	5,854	7,100

1/ Based on reported exports for countries enumerated and estimates for other countries to the USSR; excludes rice, buckwheat, millet, and other miscellaneous grains and pulses. Includes grain equivalent of flour.

2/ Partially estimated including tentative estimates for countries not enumerated, or for countries from which data is not available.

3/ Preliminary

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SG-1-87
January 1987

USSR Grain Situation and Outlook

JUL 17 '87

Following months of relatively modest activity, USSR grain buyers aggressively returned to the market this past month. Total purchases have now climbed to nearly 80 percent of projected imports. Recent severe winter weather appears to have had little impact on the flow of imported grain into the USSR but could, if it continues, increase grain feeding requirements in the livestock sector.

Crop Estimate Unchanged

The estimate of the 1986 Soviet grain harvest remains unchanged at 210 million tons, including 87 million wheat, 108 million coarse grains, and 15 million miscellaneous grains and pulses. The area estimate of 116.5 million hectares is also unchanged.

Recent Weather Developments

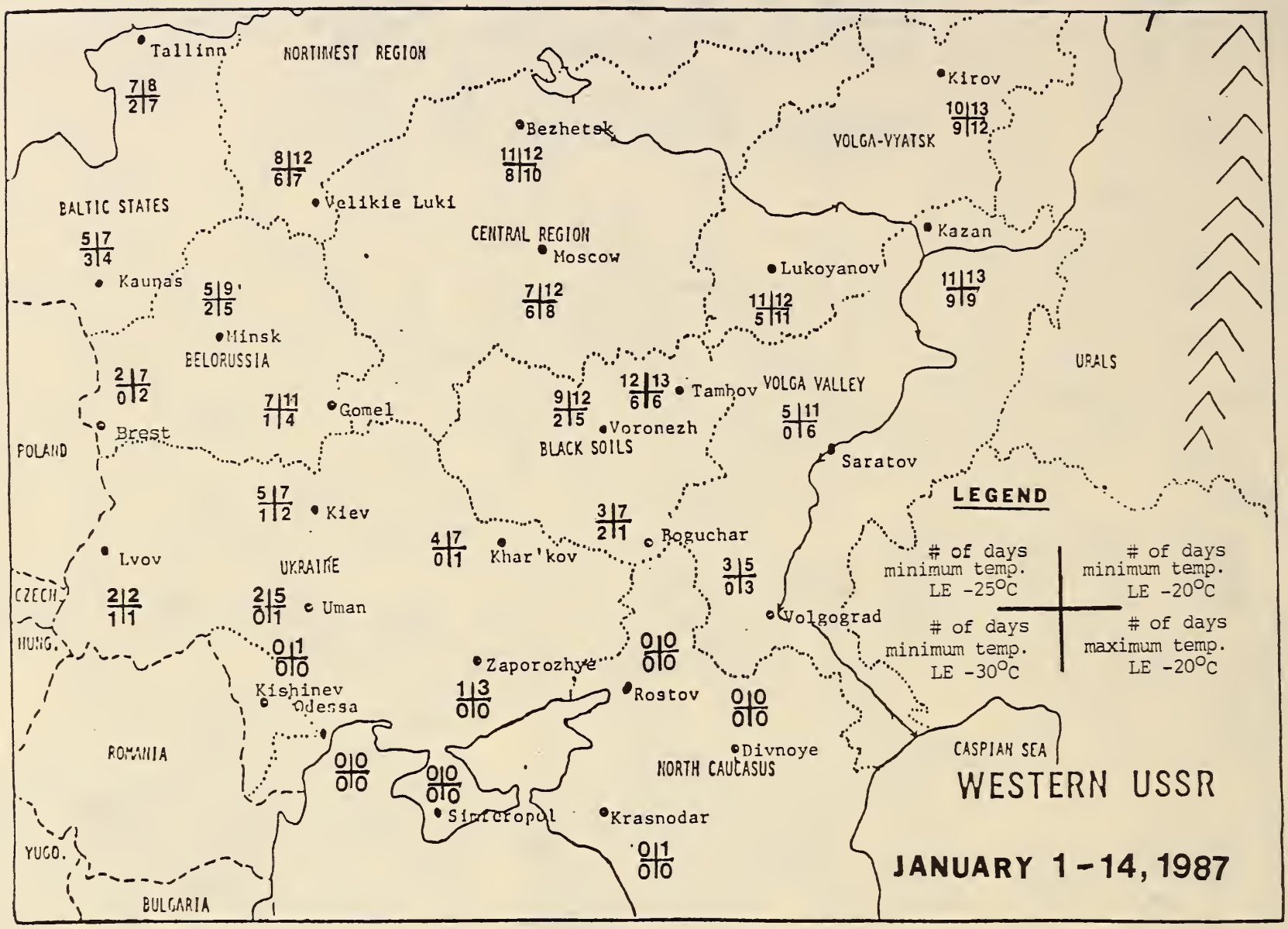
December's precipitation was near-to above-normal over most winter grain areas, increasing moisture supplies for next spring's growth. Winter grains in the southwestern Ukraine received below-normal precipitation. Snow cover increased over the northern two-thirds of the region. Winter grains remained dormant during the month. Temperatures in early December were below normal but rose to above normal by mid-month. However, on about December 24, arctic air from Siberia began to push into the region, causing a steady decline in temperatures. From January 1-12, near-record lows ranging from -30 to -35 degrees C occurred as far south as the northern Ukraine. While minimum temperatures were well below the threshold for potential winterkill (see attached maps), most areas received snow during the cold wave which produced a deep snow cover. In major winter grain producing areas from the southern half of the Ukraine through the North Caucasus, storms from the Mediterranean region caused fluctuating temperatures. Daytime highs reached 3 degrees C, while nighttime lows dropped to around -20 degrees C during the period, increasing the potential for some damage caused by ice crusting and frost heaving. On January 13 and 14, temperatures moderated over most of the major winter wheat producing areas.

Buying Activity Picks Up

The estimate of USSR grain imports for the 1986/87 marketing year continues at 21 million tons, including 12 million wheat; 8 million coarse grains; and one million rice and miscellaneous grains.

USSR grain buying activity picked up over the past month. Total commitments from all origins are now estimated at around 15 million tons, significantly above the month-earlier level but still well short of the buying pace in

Approved by the World Agricultural Outlook Board – USDA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BULGARIA
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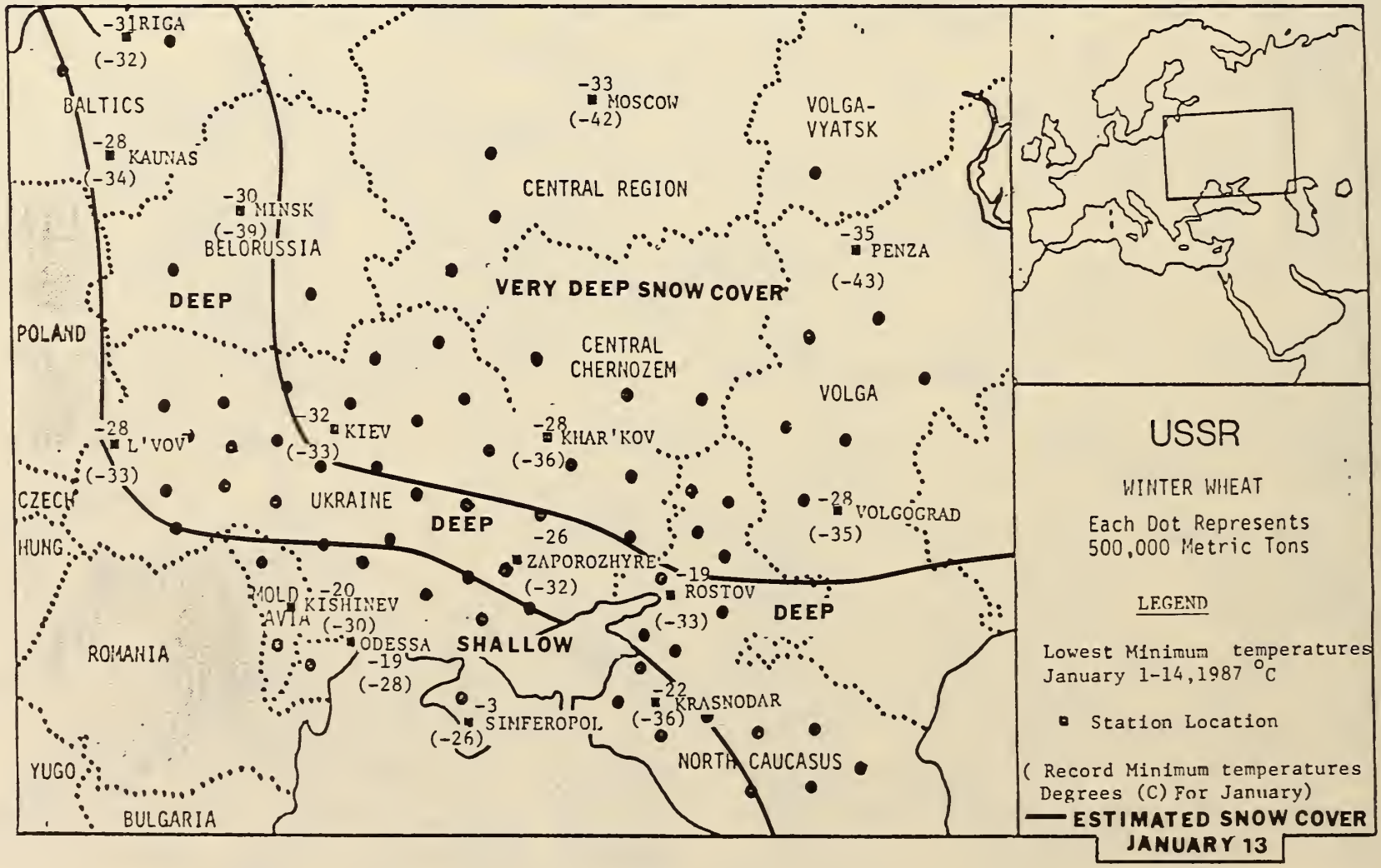
# of days minimum temp. LE -20°C
# of days minimum temp. LE -30°C
# of days maximum temp. LE -20°C
WESTERN USSR
JANUARY 1-14, 1987


-31 RIGA
(-32)
BALTICS
-33 MOSCOW
(-42)
VOLGA-VYATSK
-28 KAUNAS
(-34)
CENTRAL REGION
-30 MINSK
(-39)
BELORUSSIA
-35 PENZA
(-43)
DEEP
VERY DEEP SNOW COVER
POLAND
CENTRAL CHERNOZEM
VOLGA
-28 L'VOV
(-33)
-32 KIEV
(-33)
-28 KHAR'KOV
(-36)
CZECH
UKRAINE
DEEP
-28 VOLGOGRAD
(-35)
HUNG.
-26 ZAPOROZHYRE
(-32)
-19 ROSTOV
(-33)
MOLD -20
AVIA (-30)
KISHINEV
ODESSA
SHALLOW
DEEP
ROMANIA
-19
(-28)
-22 KRASNODAR
(-36)
-3 SIMFEROPOL
(-26)
NORTH CAUCASUS
YUGO
BULGARIA
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WINTER WHEAT
Each Dot Represents 500,000 Metric Tons
LEGEND
Lowest Minimum temperatures January 1-14,1987 °C
Station Location
(Record Minimum temperatures Degrees (C) For January)
ESTIMATED SNOW COVER JANUARY 13

earlier years. The EC was the most active seller, as France sold 2 million tons of wheat. This brings total French sales for the year to over 3 million tons. Recent grain sales by other EC suppliers are estimated at 1 to 1.5 million tons. Total EC grain sales for 1986/87 delivery to the USSR are now estimated at close to 5 million tons. Argentina reported its first sales to the USSR from the 1986 crops, including around 500,000 tons of wheat and 1 to 1.5 million tons of corn. A number of other origins also reported recent sales to the USSR. Soviet grain buyers now appear to have covered about 80 percent of projected wheat imports and nearly three-fourths of projected coarse grain imports.

USSR Feed Wheat Purchases Climb

For the first 4 months of the Canadian wheat marketing year (August-July), wheat shipments to the USSR totaled 2.1 million tons. Feed-quality wheat accounted for over half of total shipments. USSR grain buyers have shown more than usual interest in imports of feed wheat this marketing year, with Canada and the EC the principal suppliers. In contrast, Canadian shipments of high quality wheat to the USSR have been lagging badly, possibly reflecting the fact that USSR domestic procurements of milling quality wheat are up about 50 percent from a year ago. Greater dependence on domestic high quality wheat and less dependence on imports would be consistent with earlier policy decisions intended to reduce reliance on imported food-quality wheat.

Canadian Wheat Shipments to the USSR
August-July Marketing Year

	1980/81	1981/82	1982/83	1983/84	1984/85	1985/86	1986/87 Thru Nov
	---Million tons---						
CWRS No.1 & 2	2.8	4.0	5.8	6.2	5.5	4.5	.8
Canadian Feed & Utility	.3	.1	--	--	--	.5	1.1
Durum	.5	.9	1.2	.6	.5	.3	.2
Other	.4	.1	--	--	--	--	--
Total	4.0	5.1	7.0	6.8	6.0	5.2	2.1

Domestic Use Estimate Holds

The estimate of grain for domestic use in 1986/87 remains at the month-earlier level of 222 million tons. A strong livestock sector is expected to push grain used for feed to a record 127 million tons. If the recent extreme winter weather should continue, demand for grain for feed could be even higher. Wheat requirements for food, seed, and industrial use are projected to continue at around 76 million tons. The estimate of dockage and waste was set at 9 percent

of the crop, or 19 million tons. As the 1986/87 crop and projected imports are significantly above estimated utilization, the USSR should be able to add nearly 10 million tons to stocks in 1986/87.

Livestock Sector Continues Strong Growth

Inventories of cattle, hogs and poultry on state and collective farms continued at record levels as of December 1. Cow inventories remain below previous records, but average milk yields have increased sufficiently to allow for a 5-percent increase in milk production on state and collective farms during January-November. Meat production continues to outpace last year by 7-8 percent and egg production is up 6-7 percent. Such increases are the result of both good feed supplies throughout the year and more efficient use of available feeds.

USSR: Livestock Inventories on State and Collective Farms, December 1, 1982-86

	1982	1983	1984	1985	1986
	---Million head---				
Cattle	90.5	92.8	94.6	94.2	95.5
of which cows	29.7	29.7	29.6	29.2	28.9
Hogs	57.4	59.4	60.1	59.1	61.2
Sheep and goats	115.4	117.5	115.8	113.5	114.7
Poultry	695.0	709.7	737.6	752.6	756.2

USSR: Livestock Production on State and Collective Farms, Janaury-November, 1982-86

	1982	1983	1984	1985	1986
	---Million tons---				
Total meat, liveweight	14,459	15,499	16,223	16,575	17,861
Milk	58,790	63,105	64,087	65,039	68,356*
Eggs, million	44,502	46,822	48,150	49,468	52,707

*Adjusted for consistency with earlier data.

Prepared by the USDA Inter-Agency Task Force on the USSR Grain Situation.

USSR Grain Area, Yield, and Production
1975-1985, and 1986 (Forecast)

Grain	Area (Million Hectares)	Yield (Metric Tons) (Per Hectare)	Production 1/ (Million) (Metric Tons)
Wheat			
1975	62.0	1.07	66.2
1976	59.5	1.63	96.9
1977	62.0	1.49	92.2
1978	62.9	1.92	120.9
1979	57.7	1.56	90.2
1980	61.5	1.60	98.2
1981	59.2	1.37	81.1
1982	57.3	1.47	84.3
1983	50.8	1.52	77.5
1984	51.1	1.34	68.6
1985	50.3	1.55	78.1
1986 (Forecast)	48.7	1.79	87.0
Coarse Grains 2/			
1975	58.1	1.13	65.8
1976	60.9	1.89	115.0
1977	60.6	1.53	92.6
1978	58.0	1.82	105.4
1979	61.2	1.33	81.2
1980	57.9	1.39	80.5
1981	58.0	1.19	69.3
1982	58.0	1.58	91.8
1983	61.2	1.67	101.9
1984	59.2	1.53	90.5
1985	58.5	1.71	100.0
1986 (Forecast)	58.3	1.85	108.0
Total Grain 3/			
1975	127.9	1.10	140.1
1976	127.8	1.75	223.8
1977	130.3	1.50	195.7
1978	128.5	1.85	237.4
1979	126.4	1.42	179.2
1980	126.6	1.49	189.1
1981	125.6	1.26	158.2
1982	123.0	1.52	186.8
1983	120.8	1.59	192.2
1984	119.6	1.44	172.6
1985	117.9	1.62	191.7
1986 (Forecast)	116.5	1.80	210.0

1/ "Bunker weight" basis; not discounted for excess moisture or foreign material.
2/ Includes rye, barley, oats, corn, sorghum, and millet.
3/ Includes wheat, coarse grains, pulses, rice, buckwheat, and miscellaneous grains.

USSR: Total Grain, Wheat, and Coarse Grains: Supply/Utilization 1975/76-1986/87

Year	Production	Trade (Jul/Jun) Imports	Trade (Jul/Jun) Exports	Availability 1/ July/June	Total 1/	Seed	Industrial	Food	Dockage/ Waste 2/	Feed	Stock Change 3/ July/June
					(Million Metric Tons)						
					Total Grains 4/						
1975/76	140	26.1	0.7	166	178	25	5	45	14	89	-12
1976/77	224	11.0	3.3	232	220	26	5	45	31	113	+12
1977/78	196	18.9	2.3	213	229	26	5	45	29	124	-16
1978/79	237	15.6	2.8	250	230	25	6	46	28	125	+20
1979/80	179	31.0	0.8	209	223	26	6	46	22	123	-14
1980/81 5/	189	34.8	0.5	223	224	25	6	46	28	119	-1
1981/82 5/	158	47.3	0.5	205	211	25	5	47	16	118	-6
1982/83 5/	187	34.3	0.5	221	213	25	5	47	18	118	+8
1983/84 5/	192	32.5	0.5	224	218	26	5	47	21	120	+6
1984/85 5/	173	55.5	0.5	228	219	24	6	47	19	123	+9
1985/86 5/	192	29.9	0.5	221	218	24	5	47	18	124	+4
Projected 1986/87	210	21.0	1.0	230	222	24	5	47	19	127	+8
					Wheat						
1975/76	66	10.1	0.5	76	86	13	1	35	7	30	-10
1976/77	97	4.6	1.0	100	92	13	2	35	14	28	+8
1977/78	92	6.6	1.0	98	109	14	2	35	14	44	-11
1978/79	121	5.1	1.5	125	107	13	2	35	14	43	+18
1979/80	90	12.0	0.5	102	114	13	2	35	11	53	-12
1980/81 5/	98	16.0	0.5	114	113	13	2	35	15	48	+1
1981/82 5/	81	20.3	0.5	101	104	11	2	36	8	47	-3
1982/83 5/	84	20.8	0.5	105	101	11	2	36	8	44	+4
1983/84 5/	78	20.5	0.5	98	93	11	2	36	9	35	+4
1984/85 5/	69	28.1	0.5	96	91	11	2	36	8	35	+5
1985/86 5/	78	15.7	0.5	93	92	11	1	36	8	36	+2
Projected 1986/87	87	12.0	1.0	98	92	11	1	36	8	36	+6
					Coarse Grains						
1975/76	66	15.6	--	81	83	11	4	7	6	56	-2
1976/77	115	5.7	2.0	119	115	11	3	7	16	78	+4
1977/78	93	11.7	1.0	103	108	10	3	7	14	74	-5
1978/79	105	10.0	1.0	114	112	10	4	7	13	79	+2
1979/80	81	18.4	--	100	102	12	4	7	10	68	-2
1980/81 5/	81	18.0	--	99	101	12	4	7	12	66	-2
1981/82 5/	69	26.0	--	95	98	13	3	7	7	68	-3
1982/83 5/	92	12.5	--	104	101	13	3	7	9	69	+4
1983/84 5/	102	11.5	--	113	112	13	3	7	11	78	+2
1984/85 5/	90	26.9	--	117	114	12	4	7	10	81	+4
1985/86 5/	100	13.7	--	114	112	12	4	7	9	80	+2
Projected 1986/87	108	8.0	--	116	114	12	4	7	10	81	+2

1/ Availability excludes beginning stocks. Totals may not add due to rounding.
2/ Includes post harvest losses incurred in transport and storage.
3/ Minus indicates withdrawal from stocks.
4/ Total grain production, trade, and utilization figures include pulses, paddy rice, buckwheat, and miscellaneous grains in addition to wheat and coarse grains.
5/ Preliminary for trade, availability, utilization, and stocks change.

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